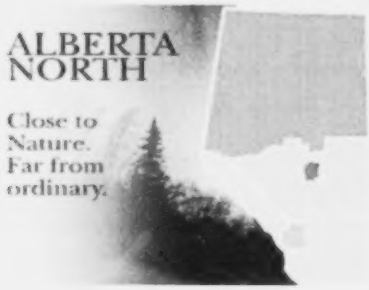
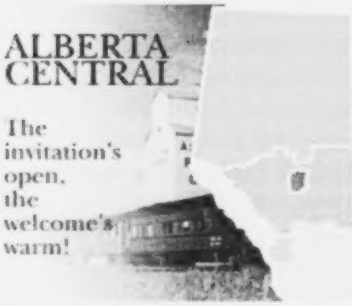
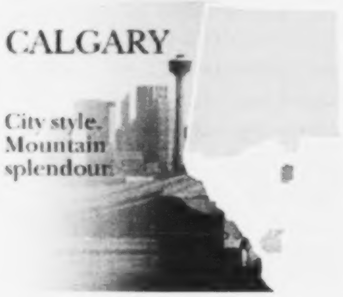
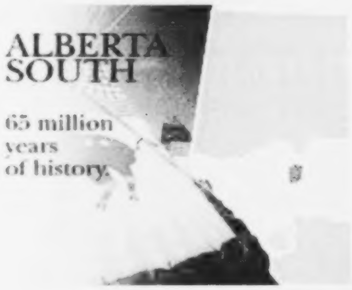

ALBERTA NORTH
Close to Nature. Far from ordinary.

EDMONTON
Plan on having fun!


ALBERTA CENTRAL
The invitation's open, the welcome's warm!

CANADIAN ROCKIES
Adventure, tranquility... and rooms to spare.


CALGARY
City style. Mountain splendour.


ALBERTA SOUTH
65 million years of history.

Alberta Residents Travel Intentions Final Report

May 2003 to October 2003 Travel Season

Alberta
ECONOMIC DEVELOPMENT
CANADA

CAA Alberta Motor Association

Tourism CALGARY

Economic Development Edmonton

Prepared by:
International Results Group
1400, 505-3rd Street S.W.
Calgary, AB T2P 0GP
Tel: (403) 237-7244
Fax: (403) 237-8186
Email: results@nucleus.com

TABLE OF CONTENTS

1.0 Introduction ....Page 1
2.0 Research Approach ....Page 1
3.0 Regional Overview ....Page 5
4.0 Profiles of Visitor Origins ....Page 26
5.0 Calgary & Area Respondent Profile ....Page 32
6.0 Edmonton & Area Respondent Profile ....Page 45
7.0 Alberta North Respondent Profile ....Page 58
8.0 Alberta Central Respondent Profile ....Page 71
9.0 Alberta South Respondent Profile ....Page 84
10.0 Canadian Rockies Respondent Profile ....Page 97

1:0 Introduction

In April 2003, under the direction of Alberta Economic Development, the 2003 Alberta Resident Survey of Travel Intentions was conducted on behalf of a partnership of Travel Alberta and the Strategic Tourism Marketing Council (STMC), the Alberta Motor Association, Tourism Calgary and Edmonton Tourism.

It is anticipated that this research will become a benchmark and tracking study that will be conducted twice a year on a recurring basis for a minimum period of three years. The purpose of this study is to gather information regarding leisure travel intentions of Alberta residents for a six month period, with a primary focus on travel within Alberta.

The results of the study will provide information to Alberta's tourism business and Destination Marketing Organizations (DMOs) to assist them in modifying marketing initiatives, and/or help them to response effectively to trends and intentions. The results of this study are actionable as they clearly identify and describe intentions for travel by geographic region within the province.

2.0 Research Approach

This research will serve as the benchmark for all future waves of data collection and involved quantitative survey research with 1,404 Albertans, which was conducted across the six (6) Tourism Regions.

Survey Methodology

In order to address the study objectives a comprehensive survey document was developed in collaboration with the Partnership members. The telephone interview technique was used to complete the survey with the 1,404 respondents. (A copy of the survey can be found in Appendix B)

Telephone surveys were conducted between May 7 and May 30, 2003, between the hours of 5:00pm and 9:00 pm weekday, and 10:00 am to 6:00 pm weekends. Interviews required an average of 12.3 minutes to complete, with the longest survey lasting 17.8 minutes. The screening criteria required the respondent to be over 18 years old, and the person in the household with the next birthday. To complete the survey, the respondent was required to have traveled within Alberta on at least one overnight leisure trip in the previous 12 months, with plans to travel on at least one overnight trip over the next 6 months.

Sampling

As the universe for the study was all adults living within Alberta who met the screening criteria, a randomly generated sample was purchased from the Telus Super Pages list services. The source included all current residential telephone listings that are accurate within one month of the commencement of data collection. The random sample was designed to reflect the actual population distribution within each of the six (6) Tourism Regions.

Data Collection

The CATI system used to conduct the survey allowed interviewers to key answers directly into SPSS. Range checks and electronically programmed skip patterns ensures that high quality data is provided. As the open-ended questions were highly detailed, extensive manual coding was required to place destinations into Tourism Regions within Alberta. Interviews were conducted by Tourism Region and finally merged into one large database.

Fielding statistics reflect that 8,354 telephone numbers were dialed at least one time during the data collection period, with 849 left eligible as contact was not obtained, leaving 7,505 numbers were initial contact was made. Of that 7,505, 19% of all telephone numbers resulted in a completed interview. The remaining 81% of numbers that did not result in completed surveys, the final status included 48% were ineligible, 17% were not in service, 18% were business or fax lines, and 9% refused participation. (See Table 1 below)

Table 1: Fielding Statistics

Status	TOTAL	Calgary & Area	Edmonton & Area	Alberta North	Alberta Central	Alberta South	Canadian Rockies
Completes	1404 18.7%	350 16.7%	350 18.9	202 19.5%	200 19.1%	200 18.8%	102 24.8%
Dead Numbers	6101	1749	1500	835	846	862	309
Language/Hearing Problems	195 3.2%	71 4.1%	75 5.0%	12 1.4%	8 0.9%	10 1.2%	19 6.1%
Respondent away for duration of study	5 0.8%	8 0.5%	21 1.4%	11 1.3%	5 0.6%	6 0.7%	0
Business/Fax Line	1112 18.2%	276 15.8%	299 19.9%	202 24.2%	138 16.3%	165 19.1%	32 10.4%
NIS	1036 17.0%	261 14.9%	179 11.9%	228 27.3%	154 18.2%	184 21.3%	30 9.7%
Survey Terminated	108 1.8%	25 1.4%	22 1.5%	18 2.2%	19 2.2%	15 1.7%	9 2.9%
Refused	571 9.4%	215 12.3%	212 14.1%	28 3.4%	54 6.4%	42 4.9%	20 6.5%
Ineligible –no leisure travel of 80km from home in past 12 months	2905 47.6%	851 48.7%	664 44.3%	328 39.3%	447 52.8%	425 49.3%	190 61.5%
Ineligible – Other	79 1.3%	30 1.7%	21 1.4%	2 0.2%	4 0.5%	14 1.6%	8 2.6%
Duplicate	44 0.7%	12 0.7%	7 0.5%	6 0.7%	17 2.0%	1 0.1%	1 0.3%
TOTAL SAMPLE USED	7,505	2,099	1,850	1,037	1,046	1,062	411
Eligible Exhausted (dialled 5 times)	849	221	223	103	109	114	79

Some 2,905 potential respondents did not qualify to participate in the study as they had no plans to travel for leisure 80 kms away from home within the next six (6) months. This represents 48% of the sample who did not qualify to complete a survey.

Margin of Error

A sample size of 1,404 provides an overall **margin of error of ±1.81%, 19 times out of 20**. At a 95% confidence level, these statistical parameters mean there is a 5%, or 1 in 20, probability that the sample population data does not reflect the larger study population, plus or minus the margin of error; smaller sub-samples have higher margins of error. Table 2 on the following page outlines the various sample sizes and margins of error for the sub-samples.

Table 2: Sampling Distribution

95% confidence level	Sample size n=	Margin of Error
Provincial Total	**1,404**	**± 1.67%**
Calgary & Area	**350**	**± 5.35%**
Alberta North	**202**	**± 7.04%**
Alberta Central	**200**	**± 7.07%**
Alberta South	**200**	**± 7.07%**
Edmonton & Area	**350**	**± 5.35%**
Canadian Rockies	**102**	**± 9.90%**

It should be noted that throughout the report and during the discussion of statistical findings, totals do not always equal 100 due to rounding, and/or single or multiple response categories.

A total of 1,404 surveys were conducted with Alberta residents to gather information regarding their intentions to travel for leisure purposes, with a primary focus on travel within Alberta. The final results of the study were weighted to better reflect the actual geographical distribution of the population of the province of Alberta (source: www.Albertafirst.com). The distribution of these surveys and their subsequent weighted totals are displayed in Table 3 below.

Table 3: Sample Distribution

Tourism Destination Region	Actual Number of Surveys Completed	Weighted Totals
Calgary & Area	350	482
Edmonton & Area	350	469
Alberta North	202	58
Alberta Central	200	232
Alberta South	200	144
Canadian Rockies	102	20
TOTAL	**1404**	**1405**

Report Layout

This report is broken into ten (10) main sections. The following Section 3.0 is a Regional Overview where comparisons of the responses from the six Tourism Regions are reported. Sections 5.0 to 10.0 consist of individual respondent profiles for each Tourism Region.

3.0 Regional Overview

The purpose of the Regional analysis is to search for patterns of shared, or different, characteristics within given geographic-based populations. The six geographic regions used in this analysis correspond to the six Alberta Tourist Regions:

1. Calgary & Area
2. Edmonton & Area
3. Alberta North
4. Alberta Central
5. Alberta South
6. Canadian Rockies

The following presents the findings from a regional segmentation of the data. Appendix B contains the detailed Cross-tabulated Data Tables that present the frequencies and statistics for each question in the survey document. The tables are labeled by the number of the survey questions from Q.1 to Q.22. The following section is an overview of the key differences between each Region.

A. Overview of Regional Differences

The key statistical differences found between the six (6) Tourism Regions are set out in this section by question asked.

Travel Intentions

Respondents were first asked to indicate the number of trips their household intended to take between June 1 and November 30th, 2003. The trips to be excluded from this response included:

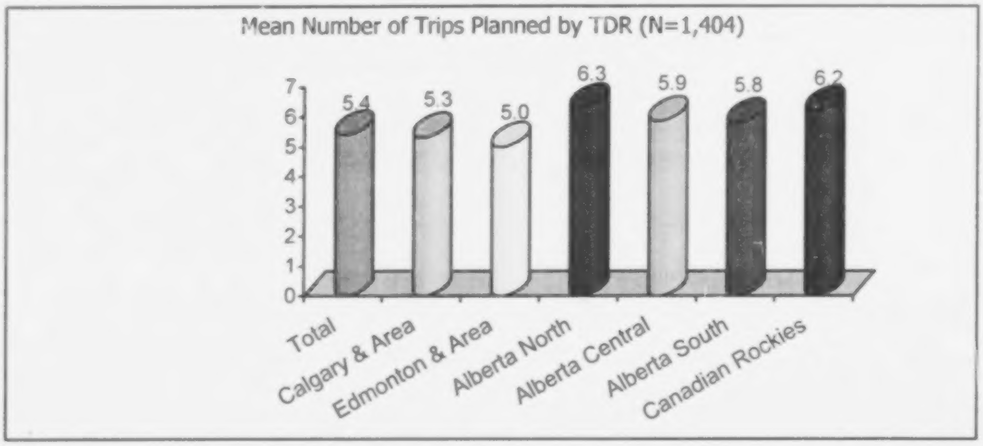
- Trips of less than 80 km away from home
- Personal errands (i.e. going for groceries, doctor appointments)
- Commuting to and from work
- Moving to a new residence

The number of intended trips over the next six months ranged anywhere from one (1) to 60 trips, with respondents, overall, averaging 5.4 trips for the next 6 months.

- Edmonton & Area respondents were planning the fewest trips of all Regions with a mean of 5.0 trips, followed by Calgary & Area (mean=5.3)
- The most trips were being planned by residents of Alberta North (mean=6.3) and the Canadian Rockies (mean=6.2). This was closely followed by Alberta Central (mean=5.9), Alberta South (mean=5.8).

(See Figure 1 on the following page)

Figure 1

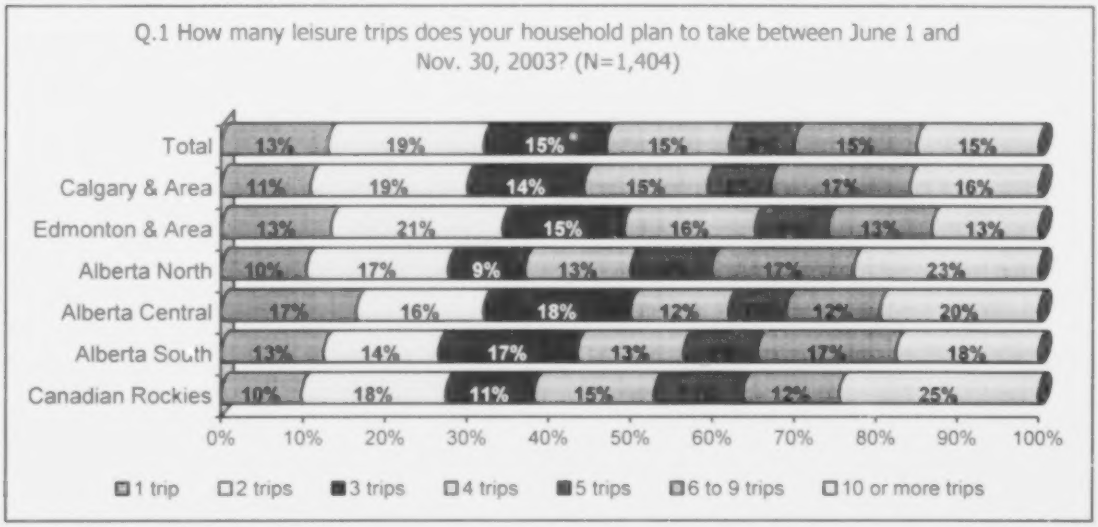


The number of respondents who plan to take one to five trips over the next six months falls into the range of 7% to 21% depending on the TDR.

Respondents located in the large urban centres of Calgary & Area and Edmonton & Area tend to plan fewer trips than those from the other Regions. Respondents from the Calgary & Area (19%) and the Edmonton & Area (21%) regions are more likely to be planning to take 2 trips over the next 6 months, while 25% of Canadian Rockies respondents and 23% of Alberta North respondents, 20% of Alberta Central and 18% of Alberta South respondents are planning to take 10 or more trips over the next 6 months.

Canadian Rockies and Alberta North respondents are less likely to be planning 1 trip, 3 trips or 5 trips, while Edmonton & Area, Calgary & Area, Alberta Central and Alberta South respondents are less likely to be planning 5 trips in the next 6 months (Figure 2 on following page)

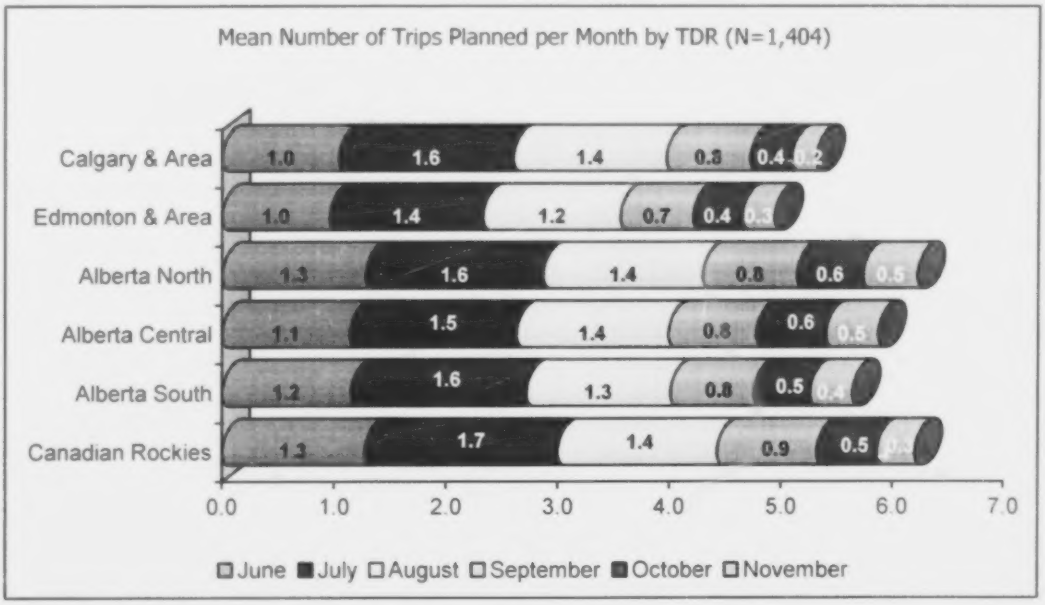
Figure 2



Q.1 How many leisure trips does your household plan to take between June 1 and Nov. 30, 2003? (N=1,404)

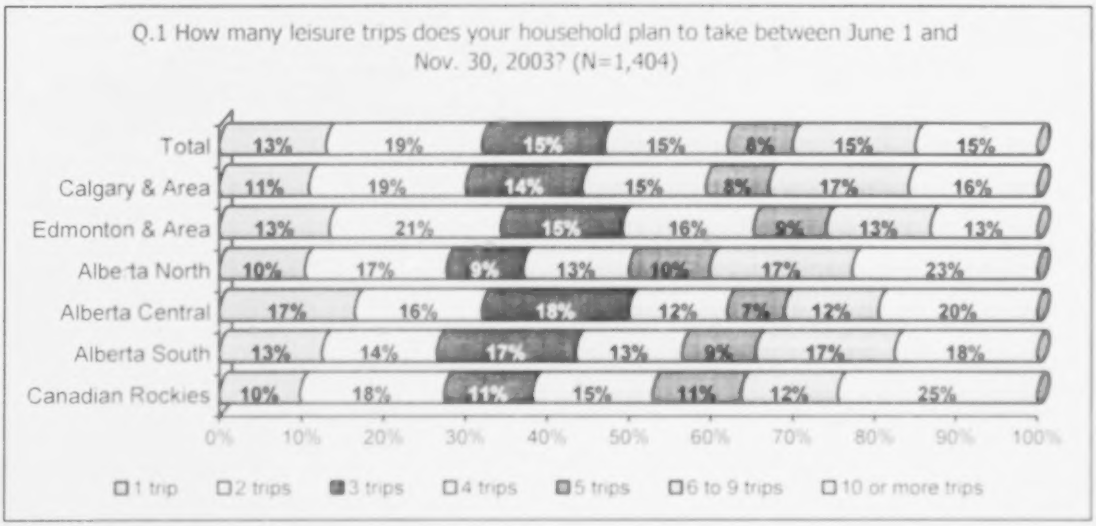
When asked to indicate the specific months they are planning their trips, Figure 3 shows very similar distribution across the 6-months regardless of the TDR. Respondents from all regions plan to take trips the most often during July and August, followed by June. On the other hand, October and November reflect considerably fewer trips. (Figure 3 below reflects mean)

Figure 3



Mean Number of Trips Planned per Month by TDR (N=1,404)

Figure 2



When asked to indicate the specific months they are planning their trips, Figure 3 shows very similar distribution across the 6-months regardless of the TDR. Respondents from all regions plan to take trips the most often during July and August, followed by June. On the other hand, October and November reflect considerably fewer trips. (Figure 3 below reflects mean)

Figure 3

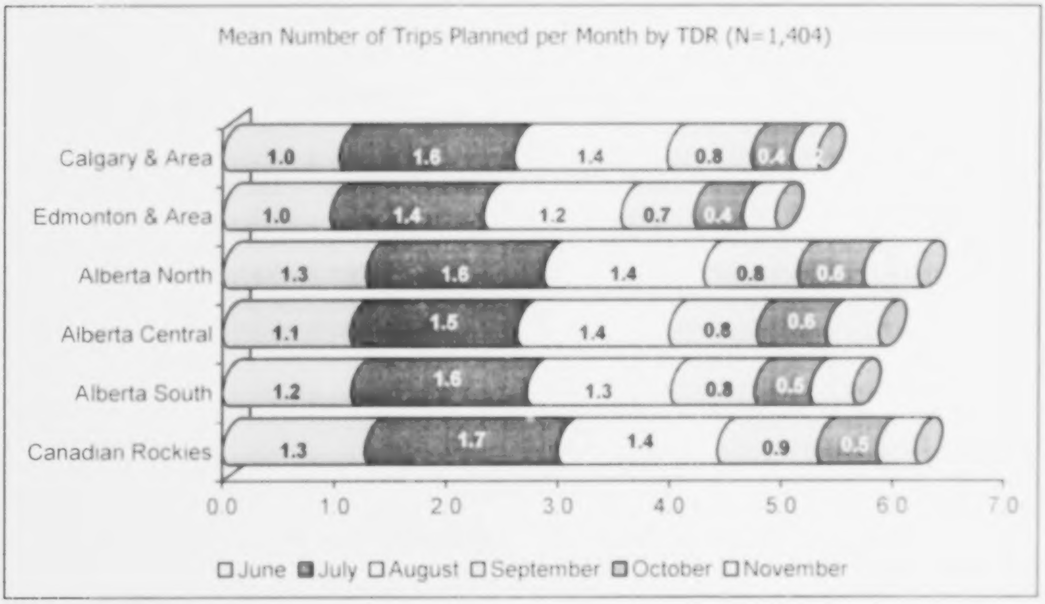
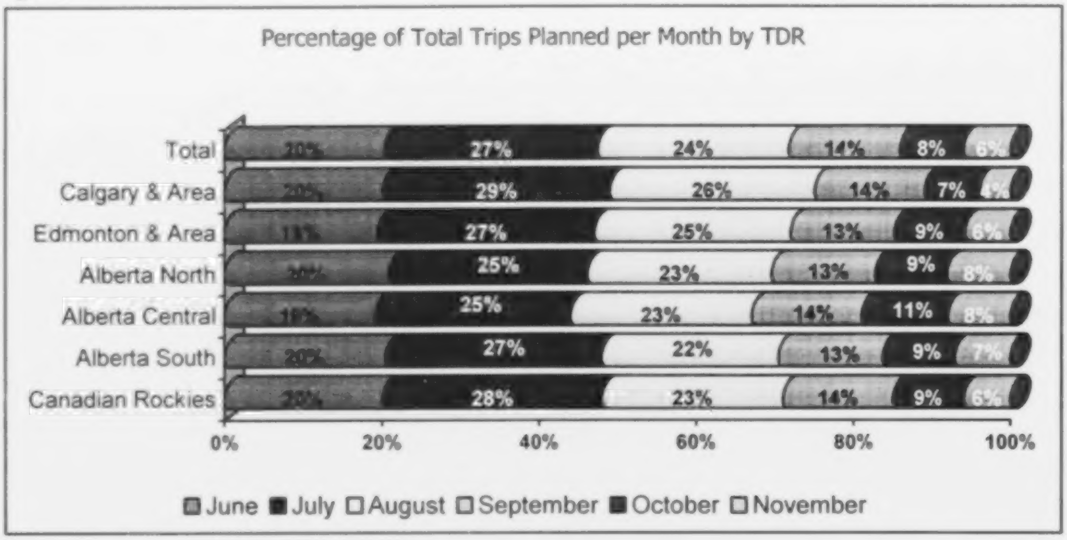


Figure 4 demonstrates the same•travel plans by percentage versus by mean as reflected in Figure 3.

Figure 4



When asked to distinguish between their plans for in-province trips and trips outside of Alberta, respondents from all regions indicated that on average they intend to take more trips within Alberta over the next 6 months (mean=3.8 trips) than outside of Alberta (mean=1.6 trips).

On average, respondents from the following Regions are planning to take two to three trips more within Alberta than they will outside of Alberta.

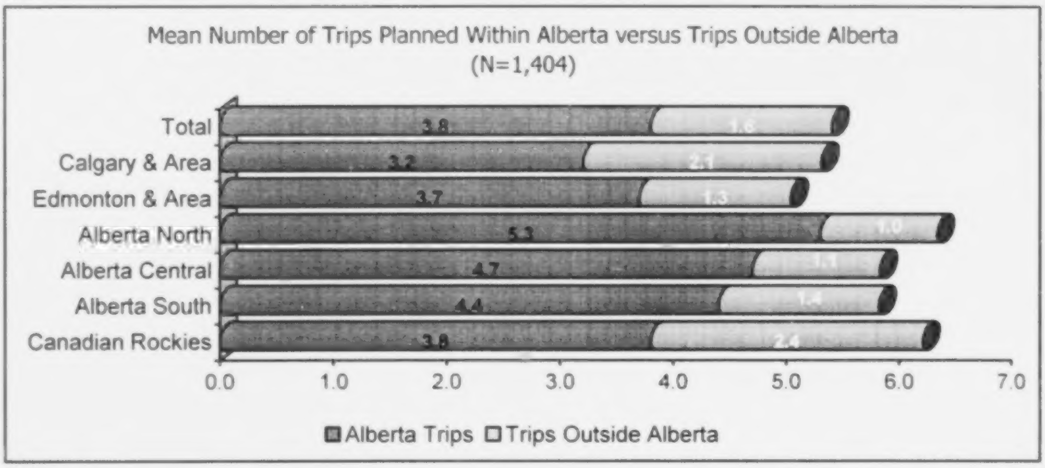
- Respondents from Edmonton & Area (within AB mean=3.6, outside AB mean=1.3),
- Alberta Central (within AB mean=4.7, outside AB mean= 1.1)
- Alberta South (within AB mean= 4.4, outside AB mean=1.4)

On the other hand, Calgary & Area respondents are planning to take one more trip within Alberta as they are outside of Alberta over the next six months (within AB mean=3.2, outside AB mean=2.1). And while respondents from the Canadian Rockies are planning to take a similar number of trips within and outside of Alberta, they again are the respondent group who plan the most trips of all TDR's, with an average of more than 5 trips planned over the next 6 months.

Travelers from Alberta North are unique in that on average they are planning four more trips within Alberta than they are planning outside the province (within AB mean=5.3, outside AB mean= 1.0). This makes these respondents the most frequent travelers to places within the province.

Figure 5 on the following page demonstrates this finding in means, and Figure 6 reflects the same outcome in percentages.

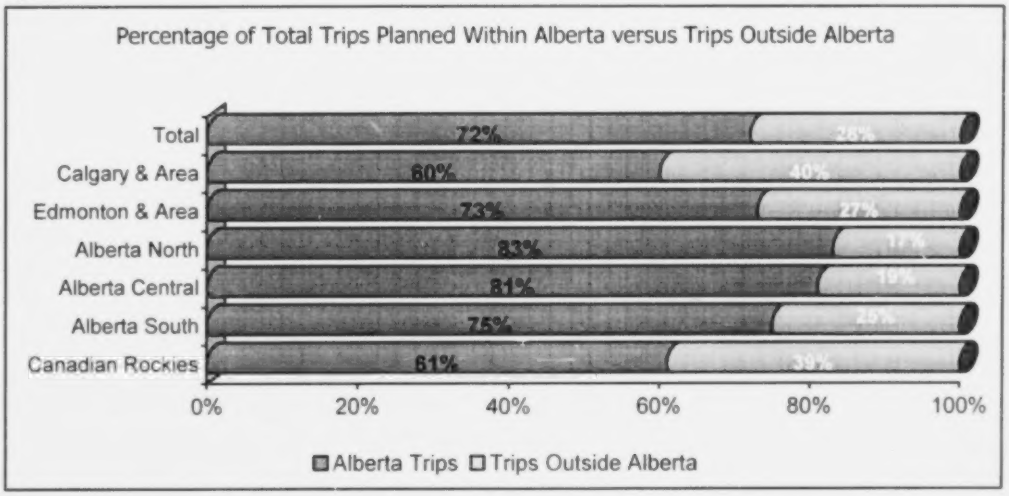
Figure 5



Mean Number of Trips Planned Within Alberta versus Trips Outside Alberta (N=1,404)

When reviewing the proportion of total number of trips taken by respondents, of the trips planned by Calgary & Area (60%) and Canadian Rockies (61%) respondents, 60% will be trips within Alberta, while the remaining 40% are destinations outside of Alberta. Almost three-quarters of the trips planned by Edmonton & Area (73%) and Alberta South (75%) respondents are for destinations within Alberta, while over 80% of the total trips planned by Alberta Central (81%) and Alberta North (83%) will be to destinations within Alberta. (See Figure 6)

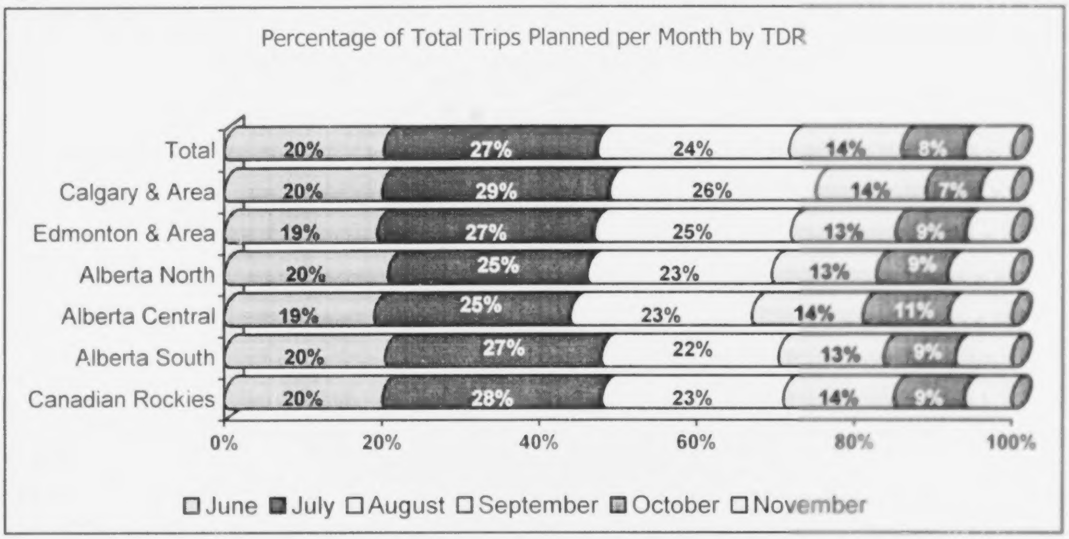
Figure 6



Percentage of Total Trips Planned Within Alberta versus Trips Outside Alberta

Figure 4 demonstrates the same travel plans by percentage versus by mean as reflected in Figure 3.

Figure 4



When asked to distinguish between their plans for in-province trips and trips outside of Alberta, respondents from all regions indicated that on average they intend to take more trips within Alberta over the next 6 months (mean=3.8 trips) than outside of Alberta (mean=1.6 trips).

On average, respondents from the following Regions are planning to take two to three trips more within Alberta than they will outside of Alberta.

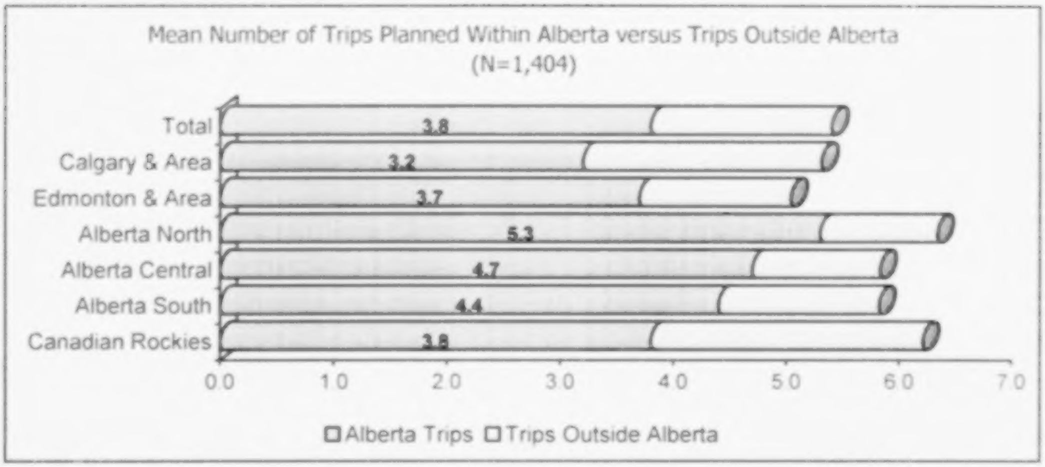
- Respondents from Edmonton & Area (within AB mean=3.6, outside AB mean=1.3),
- Alberta Central (within AB mean=4.7, outside AB mean= 1.1)
- Alberta South (within AB mean= 4.4, outside AB mean=1.4)

On the other hand, Calgary & Area respondents are planning to take one more trip within Alberta as they are outside of Alberta over the next six months (within AB mean=3.2, outside AB mean=2.1). And while respondents from the Canadian Rockies are planning to take a similar number of trips within and outside of Alberta, they again are the respondent group who plan the most trips of all TDR's, with an average of more than 5 trips planned over the next 6 months.

Travelers from Alberta North are unique in that on average they are planning four more trips within Alberta than they are planning outside the province (within AB mean=5.3, outside AB mean= 1.0). This makes these respondents the most frequent travelers to places within the province.

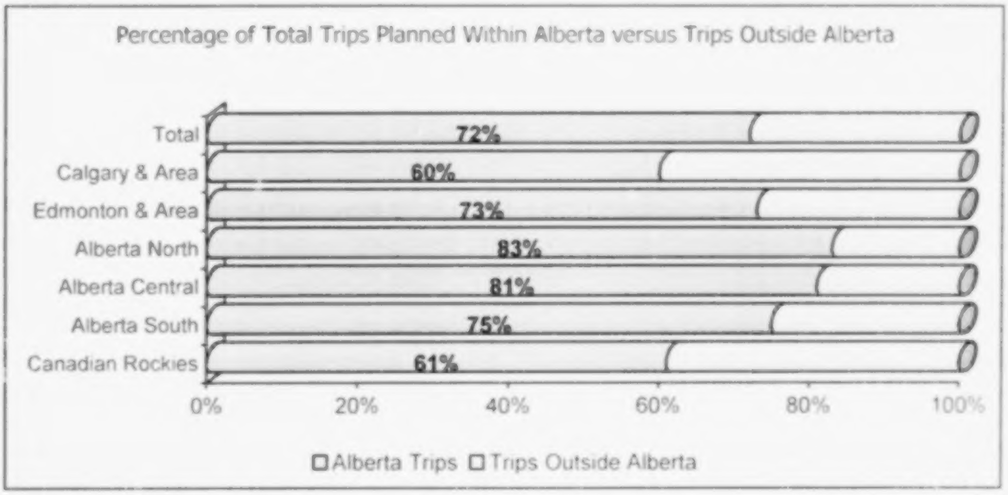
Figure 5 on the following page demonstrates this finding in means, and Figure 6 reflects the same outcome in percentages.

Figure 5



When reviewing the proportion of total number of trips taken by respondents, of the trips planned by Calgary & Area (60%) and Canadian Rockies (61%) respondents, 60% will be trips within Alberta, while the remaining 40% are destinations outside of Alberta. Almost three-quarters of the trips planned by Edmonton & Area (73%) and Alberta South (75%) respondents are for destinations within Alberta, while over 80% of the total trips planned by Alberta Central (81%) and Alberta North (83%) will be to destinations within Alberta. (See Figure 6)

Figure 6



Destinations outside Alberta

When asked about their intended destinations outside of Alberta, travel within Canada dominates; in particular travel to British Columbia. Next to British Columbia, respondents from Calgary & Area (29%), Edmonton & Area (22%), Alberta North (37%) and the Canadian Rockies (24%) are planning to travel to the rest of Canada with the most frequency. Next to British Columbia, Alberta Central respondents are more likely to travel to Saskatchewan (27%), and respondents from Alberta South are more likely to travel to the USA (24%). (Table 4 below)

Table 4

Q.3C What destinations outside Alberta do you plan to visit? (Multiple Response) (n=979)	**Total N=979**	**Calgary & Area n=391**	**Edmonton & Area n=316**	**Alberta North n=33***	**Alberta Central n=129**	**Alberta South n=94***	**Canadian Rockies n=15***
British Columbia	64.5%	71.8%	58.5%	55.7%	62.2%	58.8%	75.9%
Saskatchewan	16.7%	13.0%	17.4%	13.9%	27.0%	18.3%	7.6%
The Rest of Canada	24.5%	28.5%	22.0%	37.4%	21.6%	15.3%	24.1%
USA	16.9%	15.1%	19.1%	12.2%	14.4%	23.7%	7.6%
Europe	5.4%	6.7%	5.1%	1.7%	4.5%	3.8%	6.3%
Southern Sun	3.4%	4.9%	2.5%	3.5%	0	4.6%	5.1%
Other International	4.1%	3.9%	6.4%	0	2.7%	1.5%	1.3%

**Use caution in the interpretation of these results due to small sample size n<100.*

Regardless of the region, the majority of respondents who are not planning any leisure trips within Alberta over the next six months indicated they have *"no particular reason"* for not traveling within the province. Other reasons given are detailed in Table 5 by TDR.

Table 5

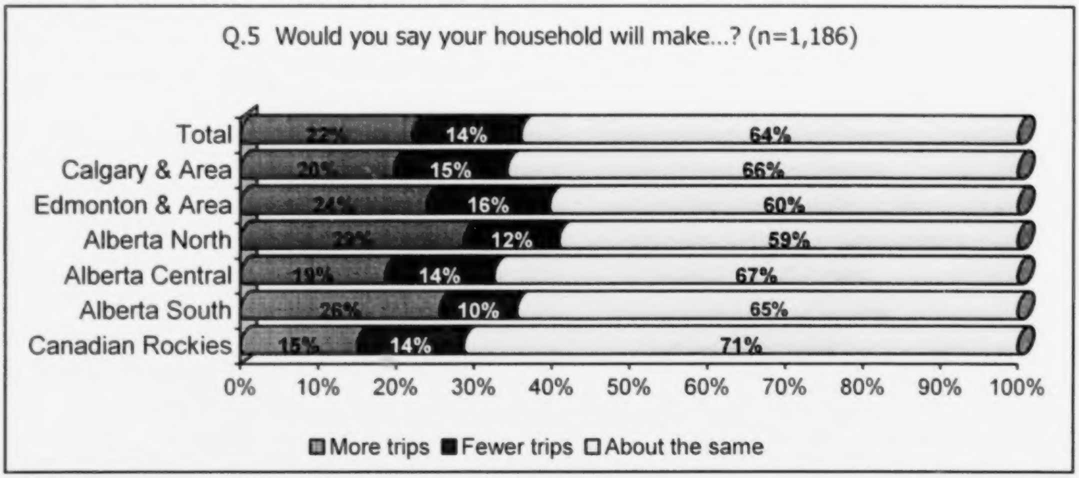
Q.4 Is there any particular reason why you do not intend to make any leisure trips in Alberta in the next 6 months (Multiple Response) (n=235)	**Total N=235**	**Calgary & Area n=103**	**Edmonton & Area n=71***	**Alberta North n=6***	**Alberta Central n=32***	**Alberta South n=20***	**Canadian Rockies n=3***
No particular reason	53.7%	52.0%	43.4%	45.0%	71.4%	67.9%	50.0%
No interest/prefer destinations outside Alberta	20.2%	21.3%	30.2%	25.0%	10.7%	10.7%	7.1%
Nothing new to do or see in Alberta	6.9%	4.0%	4.0%	0	0	3.6%	14.3%
No time – too busy	6.4%	1.3%	9.4%	10.0%	7.1%	10.7%	7.1%
No money – financial	5.5%	5.3%	5.7%	5.0%	0	7.1%	14.3%
Need more info on things to do	1.4%	0	5.7%	0	0	0	0
Other;	12.4%	17.3%	3.8%	20.0%	10.7%	14.3%	7.1%
• Relatives live outside Alberta	(19)	(11)	(1)	(1)	(3)	(1)	(1)
• Bad Weather in Alberta	(3)	(3)				(1)	
• Vacation property located outside AB	(3)	(3)					
• Too crowded	(1)	(1)					
• Moving out of the province	(1)		(1)				

**Use caution in the interpretation of these results due to small sample size n<100.*

In-Province Travelers (n=1,186)

Across all six TDR's, the majority of in-province travelers indicated their 2003 travel intentions are either the same (range=59% to 71%), or have increased (range =15% to 29%) compared to 2002. Sixteen percent and less (range=10% to 16%) of in-province travelers plan to travel less in 2003 than they did in 2002. (Figure 7)

Figure 7



Q.5 Would you say your household will make...? (n=1,186)

On average, respondents from Alberta South plan to make the most overnight trips in the province, with a mean of 2.6 overnight trips planned for the next six months. Respondents from Alberta North (mean=1.9 trips) and Alberta Central (mean=1.6 trips) plan to take 2 overnight trips on average, while respondents from the Canadian Rockies (mean=1.3 trips), Calgary & Area (mean=1.0 trips) and Edmonton & Area (mean=0.9 trips) are planning fewer overnight trips.

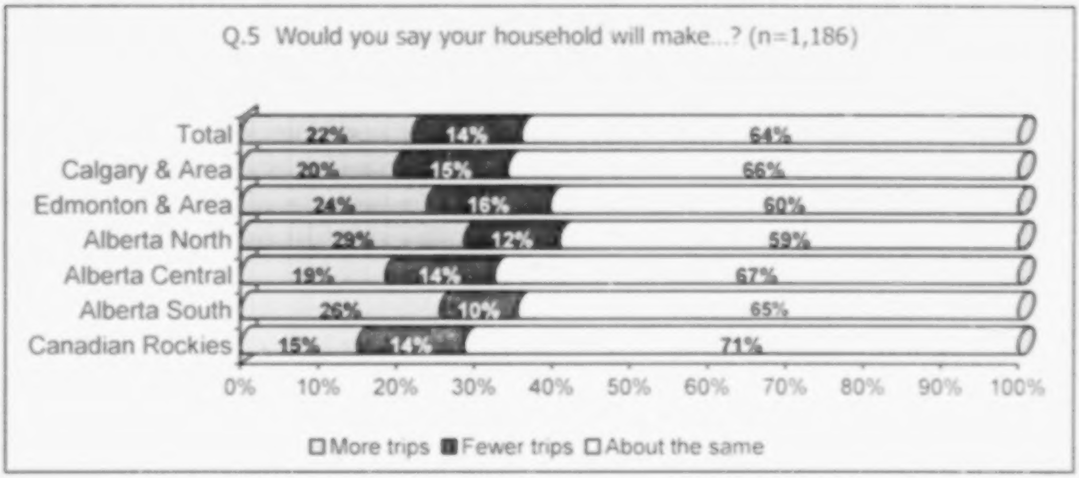
Respondents from Alberta North (mean=3.1 trips) and Alberta Central (mean=2.9 trips) are planning to make the most weekend or long weekend trips, followed by respondents from Edmonton & Area (mean=2.7 trips) and Calgary & Area (mean=2.7 trips). Respondents from the Canadian Rockies plan to take fewer trips reporting 2 and possibly 3 weekend trips (mean=2.4 trips), and respondents from Alberta South plan to take the fewest number of weekend trips (mean=2.0 trips)

When it comes to week or longer trips, Alberta North leads the way with plans to take an average of one trip of this length (mean=1.0 trips). On the other hand, respondents from Alberta Central (mean=0.6 trips), Edmonton & Area (mean=0.6 trips), Canadian Rockies (mean=0.5 trips), Calgary & Area (mean=0.5 trips) and Alberta South (mean=0.4 trips) each plan to take between zero and 1 trip of a week or longer over the next six months. (See Figure 8 on the following page).

In-Province Travelers (n=1,186)

Across all six TDR's, the majority of in-province travelers indicated their 2003 travel intentions are either the same (range=59% to 71%), or have increased (range =15% to 29%) compared to 2002. Sixteen percent and less (range=10% to 16%) of in-province travelers plan to travel less in 2003 than they did in 2002. (Figure 7)

Figure 7

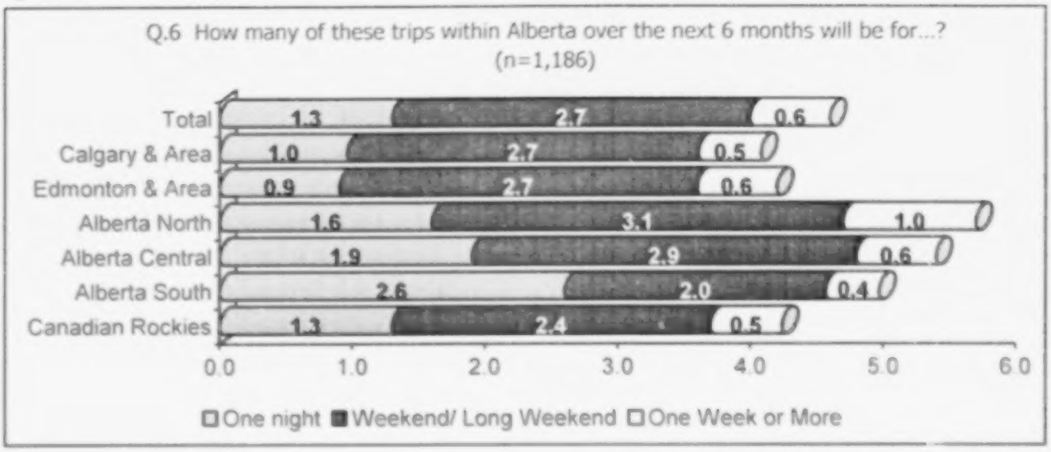


On average, respondents from Alberta South plan to make the most overnight trips in the province, with a mean of 2.6 overnight trips planned for the next six months. Respondents from Alberta North (mean=1.9 trips) and Alberta Central (mean=1.6 trips) plan to take 2 overnight trips on average, while respondents from the Canadian Rockies (mean=1.3 trips), Calgary & Area (mean=1.0 trips) and Edmonton & Area (mean=0.9 trips) are planning fewer overnight trips.

Respondents from Alberta North (mean=3.1 trips) and Alberta Central (mean=2.9 trips) are planning to make the most weekend or long weekend trips, followed by respondents from Edmonton & Area (mean=2.7 trips) and Calgary & Area (mean=2.7 trips). Respondents from the Canadian Rockies plan to take fewer trips reporting 2 and possibly 3 weekend trips (mean=2.4 trips), and respondents from Alberta South plan to take the fewest number of weekend trips (mean=2.0 trips)

When it comes to week or longer trips, Alberta North leads the way with plans to take an average of one trip of this length (mean=1.0 trips). On the other hand, respondents from Alberta Central (mean=0.6 trips), Edmonton & Area (mean=0.6 trips), Canadian Rockies (mean=0.5 trips), Calgary & Area (mean=0.5 trips) and Alberta South (mean=0.4 trips) each plan to take between zero and 1 trip of a week or longer over the next six months. (See Figure 8 on the following page).

Figure 8



When reviewing the proportion of total number of trips planned, more than half of all trips planned by Alberta South respondents will be overnight (52%), followed by Alberta Central (35%), Canadian Rockies (30%), Alberta North (28%) and Calgary & Area (24%). Edmonton & Area respondents proportionately plan to take the fewest number of overnight trips (20%).

However, Edmonton & Area respondents (63%), along with Calgary & Area (65%) respondents plan to take the most weekend or long weekend trips, followed by the Canadian Rockies (55%), Alberta North (54%) and Alberta Central (53%) respondents. Alberta South respondents plan the fewest weekend or long weekend trips, with just over a third (39%) planning trips of this length.

A much smaller 8% to 17% of trips planned by respondents are for a week or longer in length. The fewest are planned by Alberta South respondents (8%), and the highest number is planned by Alberta North (17%). (Figure 9 below)

Figure 9

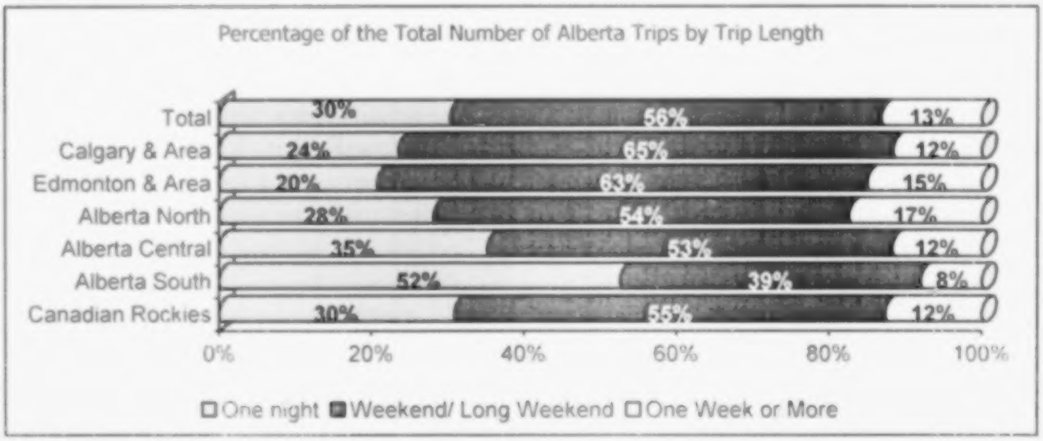
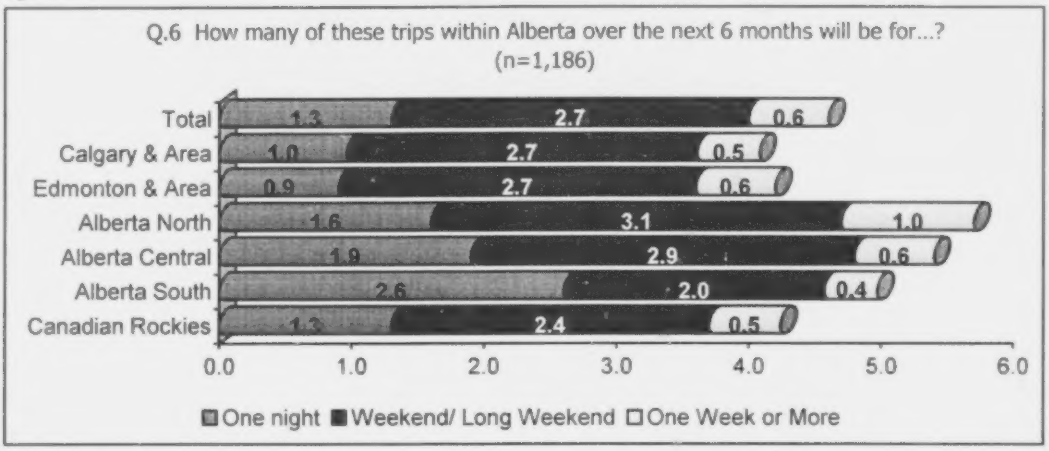


Figure 8

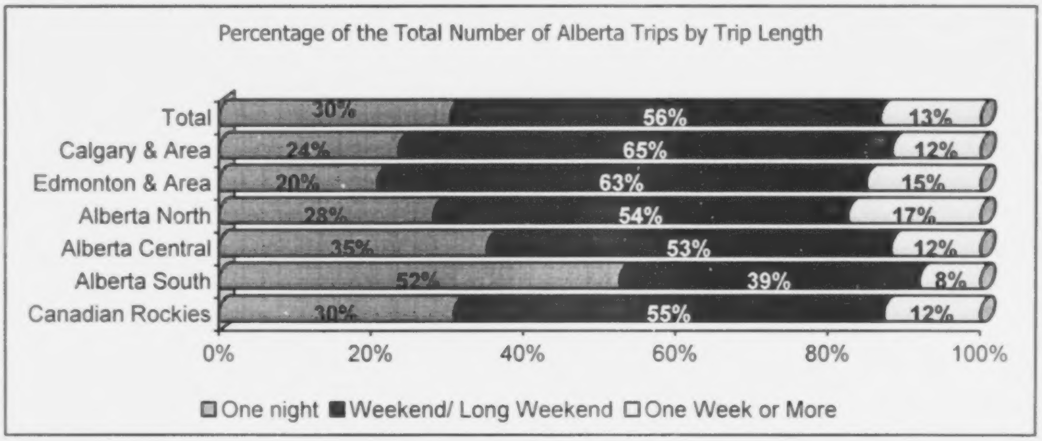


When reviewing the proportion of total number of trips planned, more than half of all trips planned by Alberta South respondents will be overnight (52%), followed by Alberta Central (35%), Canadian Rockies (30%), Alberta North (28%) and Calgary & Area (24%). Edmonton & Area respondents proportionately plan to take the fewest number of overnight trips (20%).

However, Edmonton & Area respondents (63%), along with Calgary & Area (65%) respondents plan to take the most weekend or long weekend trips, followed by the Canadian Rockies (55%), Alberta North (54%) and Alberta Central (53%) respondents. Alberta South respondents plan the fewest weekend or long weekend trips, with just over a third (39%) planning trips of this length.

A much smaller 8% to 17% of trips planned by respondents are for a week or longer in length. The fewest are planned by Alberta South respondents (8%), and the highest number is planned by Alberta North (17%). (Figure 9 below)

Figure 9



Travel Size

Travel party size for intended travel within Alberta ranges from one to nine persons, with the average travel group ranging between two and three persons for both weekend and week or more trips, consistent across all TDR's.

Planning Time

The range of days needed to plan both weekend and trips of a week or longer ranges between less than 1 day to a full year.

The time required to plan weekend trips reflects the following pattern (means):

- Respondents from Alberta South (mean=12.1 days) and the Canadian Rockies (mean=14.1 days) tend to require the least amount of time to plan their weekend trips
- Respondents from Alberta Central (mean=15.7 days), Calgary & Area (mean=15.8 days) and Alberta North (mean=16.5 days) take longer.
- Travelers from Edmonton & Area require the most time to plan weekend trips, reporting a mean of 18.3 days.

The time required by respondents to plan one week or longer trips follows a different pattern;

- Canadian Rockies respondents require the least amount of time (mean=31.6 days)
- Respondents from Alberta South (mean=32.0 days), Calgary & Area (mean=36.7 days) and Edmonton & Area respondents (mean=42.0 days) require a longer amount of time.
- Respondents from Alberta Central (mean=47.4 days) and Alberta North (mean=51.3 days) require on average the most time to plan for week or longer trips.

(See Table 6 on the following page)

Table 6

Q.7 How many members of your household will be traveling on...	Range	Mean (weighted)	Mode (weighted)	Not Applicable (weighted)*
A. Weekend trips			2 persons	n=60
▸ Calgary & Area	1 to 6	2.56 persons	41.5%	(15)
▸ Edmonton & Area	1 to 6	2.59 persons	40.4%	(29)
▸ Alberta North	1 to 7	2.77 persons	37.4%	(0)
▸ Alberta Central	1 to 8	2.67 persons	41.3%	(10)
▸ Alberta South	1 to 6	2.58 persons	40.1%	(4)
▸ Canadian Rockies	1 to 9	2.53 persons	42.0%	(0)
B. Trips of one week or longer			2 persons	n=190
▸ Calgary & Area	1 to 6	2.52 persons	35.3%	(59)
▸ Edmonton & Area	1 to 6	2.54 persons	34.7%	(76)
▸ Alberta North	1 to 7	2.68 persons	29.7%	(7)
▸ Alberta Central	1 to 8	2.75 persons	36.0%	(32)
▸ Alberta South	1 to 8	2.64 persons	40.7%	(13)
▸ Canadian Rockies	1 to 6	2.54 persons	42.0%	(2)
Q.8 How many days in advance do you typically plan leisure trips within Alberta for...	**Range**	**Mean (weighted)**	**Mode (weighted)**	**Not Applicable (weighted)***
A. Weekend trips			7 days	n=48
▸ Calgary & Area	0 to 90	15.8 days	37.8%	(12)
▸ Edmonton & Area	0 to 365	18.3 days	24.6%	(25)
▸ Alberta North	0 to 120	16.5 days	30.8%	(1)
▸ Alberta Central	0 to 365	15.7 days	23.8%	(7)
▸ Alberta South	0 to 90	12.1 days	23.3%	(2)
▸ Canadian Rockies	0 to 365	14.1 days	37.5%	(1)
B. Trips of one week or longer			30 days	n=173
▸ Calgary & Area	0 to 365	36.7 days	20.4%	(67)
▸ Edmonton & Area	0 to 365	42.0 days	27.9%	(52
▸ Alberta North	0 to 240	51.3 days	23.1%	(6)
▸ Alberta Central	0 to 365	47.4 days	17.4%	(31)
▸ Alberta South	0 to 180	32.0 days	23.8%	(14)
▸ Canadian Rockies	0 to 365	31.6 days	21.6%	(2)

**These respondents indicated they do not typically take trips of this length when traveling in Alberta*

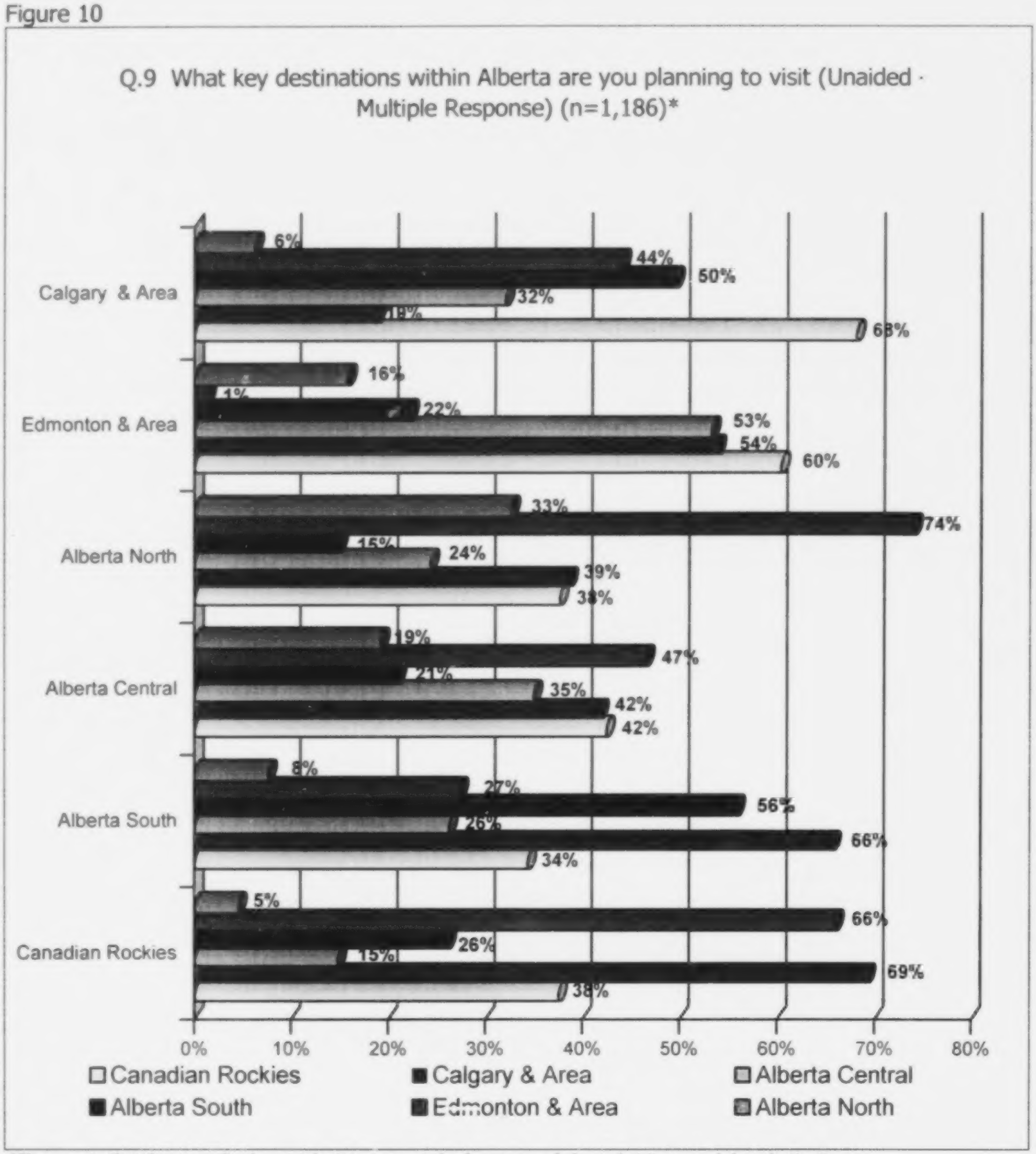
Destinations

When asked about the destinations they plan to visit over the next six months:

- Calgary & Area (68%) respondents named destinations within the Canadian Rockies the most frequently, as did Edmonton & Area respondents (60%).
- The most popular destinations named by Alberta North respondents are within the Edmonton & Area region (74%).
- Alberta Central respondents tend to plan trips to destinations within three regions; Edmonton & Area (47%), Calgary & Area (42%) and the Canadian Rockies (42%).
- Alberta South respondents favor destinations in Calgary & Area (66%) and within their own region (56%).
- Canadian Rockies respondents are more likely to plan visits to destinations in the major urban centres of Calgary & Area (69%) and Edmonton Area (66%).

A more detailed breakdown of the preferred destinations by respondent origin is reported in the individual Regional Profiles set out later in this report. (See Figure 10 on the following page)

Figure 10



**Please note that these results do not take into account the frequency of planned visits to each key destination*

Activities

Respondents were asked to indicate how likely they are to participate in a variety of activities while on these leisure trips. The most popular activity across all six TDR's was *Visiting family and friends;* with a mean ranging from 3.3 to 3.7 out of 4. (See Table 7 on the following page)

Calgary & Area and Edmonton & Area

- Calgary & Area respondents are more likely to participate in Outdoor Summer activities (mean 3.2 out of 4), the larger events of the Calgary Stampede/Klondike days (2.7 out of 4), Spectator Sports (2.1 out of 4) and Spas and Other Health Club Activities (2.0 out of 4) than respondents from other TDR's.

- Edmonton & Area respondents were more often above average for participation in various activities overall. This respondent group is more likely to participate in activities such as Museums & Historic Sites (2.8 out of 4), Festivals and Cultural Activities (2.7 out of 4), the Calgary Stampede & Klondike days (2.5 out of 4), Attractions (2.4 out of 4), Spectator Sports & Entertainment (2.2 out of 4), Team Sports (2.1 out of 4), Organized Sports Events (2.1 out of 4), Outdoor Winter Sports (2.0 out of 4), Spas & Other Health Club Activities (2.0 out of 4) and Aboriginal Attractions (1.9 out of 4).

Less popular activities for both Calgary & Area and Edmonton & Area respondents include Outdoor Recreation, Outdoor Adventure, Outdoor Leisure, Indoor Leisure, and Visiting Friends and Relatives. Respondents from both regions are less likely to participate in these activities than respondents living in other regions.

Alberta North

- Activities that are more popular among Alberta North respondents than other regions include Visiting Friends & Relatives (3.7 out of 4), Outdoor Summer Activities (3.2 out of 4), Outdoor Leisure Activities (3.2 out of 4), Outdoor Recreation (3.2 out of 4), Indoor Leisure Activities (3.2 out of 4) and Attractions (2.8 out of 4).

Alberta Central

- Alberta Central respondents tend to participate in Visiting Friends & Relatives (3.5 out of 4), Outdoor Leisure (3.2 out of 4), Indoor Leisure (2.9 out of 4) and Museum and Historical Site (2.8 out of 4) activities more than other respondent groups.

Alberta South

- Respondents from Alberta South tend to participate the most in activities such are Visiting Friends & Relatives (3.6 out of 4), Outdoor Recreation (3.3 out of 4), Outdoor Leisure (3.2 out of 4), and Outdoor Summer (3.0 out of 4). More than other regions, they participate in Indoor Leisure Activities (2.8 out of 4), Attractions (2.4 out of 4), Team Sports (2.1 out of 4), Outdoor Adventure (2.0 out of 4) and Aboriginal Attractions (2.0 out of 4).

Overall, respondents from the rural areas of Alberta North, Alberta Central and Alberta South participate less in activities such as the Calgary Stampede/Klondike Days, Festivals & Cultural Activities, Organized Sports Events, Spectator Sports & Entertainment and Spas & Other Health Club Activities than respondents from the large urban regions.

Canadian Rockies

- Respondents from the Canadian Rockies tend to participate more than other respondents in only two activities; Outdoor Winter Sports (2.3 out of 4) and Outdoor Adventure (2.1 out of 4). In all other activities Canadian Rockies respondents tend to participate less than the overall mean.

Table 7

Q.10 Activities (N=1404)	**Total N=1404**	**Calgary & Area n=350**	**Edmonton & Area n=350**	**Alberta North n=202**	**Alberta Central n=200**	**Alberta South n=200**	**Canadian Rockies n=102**
Visit Friends & Relatives	3.42	3.3	3.4	3.7	3.5	3.6	3.3
Outdoor Summer Sports	3.13	3.2	3.0	3.2	3.1	3.0	2.9
Outdoor Leisure	3.13	3.1	3.1	3.2	3.2	3.2	2.4
Outdoor Recreation	3.10	3.1	3.1	3.2	3.0	3.3	3.0
Indoor Leisure Activities	2.76	2.8	2.6	3.2	2.9	2.8	2.8
Museums & Historical Sites	2.68	2.6	2.8	2.5	2.8	2.5	2.3
Festivals & Cultural Activities	2.47	2.4	2.7	2.3	2.2	2.3	2.4
Calgary Stampede/ Klondike Days	2.44	2.7	2.5	1.9	2.0	2.3	2.0
Attractions	2.35	2.2	2.4	2.8	2.3	2.4	2.2
Spectator Sports & Entertainment	2.08	2.1	2.2	1.9	1.9	1.9	1.9
Team Sports	2.03	1.9	2.1	2.0	2.0	2.1	1.9
Outdoor Winter Sports	1.99	2.0	2.0	1.9	1.9	2.0	2.3
Organized Sports Events	1.98	2.0	2.1	2.0	1.9	1.8	1.7
Spas & Other Health Club	1.89	2.0	2.0	1.7	1.6	1.7	1.7
Aboriginal Attractions	1.80	1.7	1.9	1.7	1.7	2.0	1.7
Outdoor Adventure	1.71	1.7	1.7	1.7	1.6	2.0	2.1

Travel Information Source

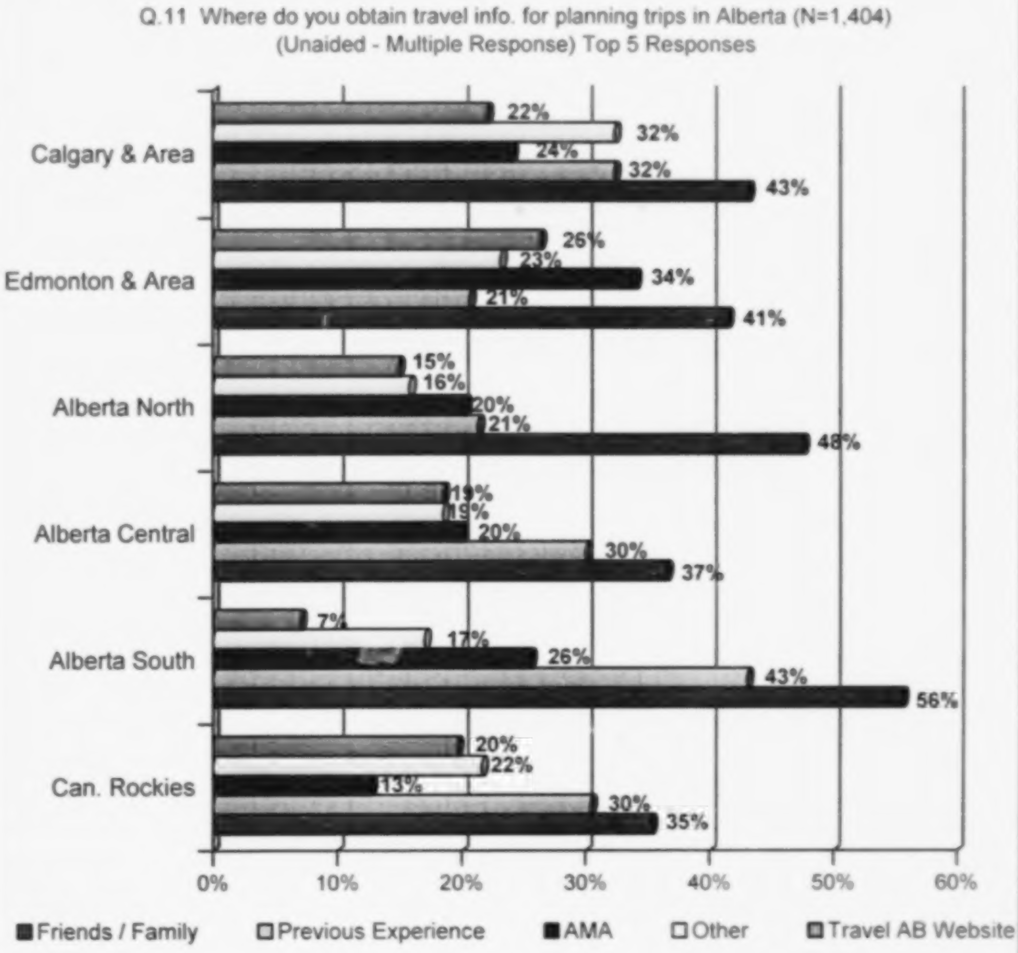
When asked about the sources relied on when planning trips within Alberta, the most frequently mentioned source by all respondents is *friends, family* or *word-of-mouth;* cited by from 35% to 56% of respondents. Previous experience is also frequently mentioned as a source, primarily the most often by respondents from Alberta South (43%), Calgary & Area (32%), Canadian Rockies (30%) and Alberta Central (30%).

The AMA is cited as a source of travel information the most often by respondents from Edmonton & Area (34%) and Alberta South (26%).

Between 16% and 32% of respondents named a variety of other sources including, the Internet in general, books, maps, or travel agents.

Respondents from Edmonton & Area (26%), Calgary & Area (22%) and the Canadian Rockies (20%) are most likely of all respondents to use the Travel Alberta website as a source for travel information. (See Figure 11 on the following page for details)

Figure 11



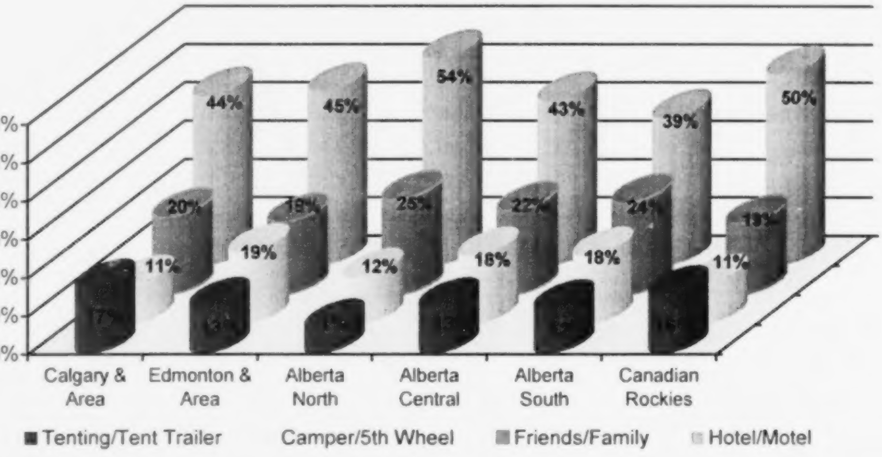
Accommodations

Few differences are noted when it comes to the typical choice of accommodations for a weekend trips. The majority of respondents from all regions report a preference for Hotel/Motel accommodations (39% to 50%), followed by staying with friends and relatives (19% to 25%).

To a lesser degree staying in a camper/fifth wheel/Motorhome is more popular among respondents from Edmonton & Area (19%), Alberta Central (18%), Alberta South (18%) and Alberta North (12%) respondents. Tenting, or a tent trailer, is chosen more often for weekend trips by respondents from Calgary & Area (17%) and the Canadian Rockies (16%). (Figure 12 on the following page).

Figure 12

Q.12A What is your typical choice of accommodation for Weekend Trips in Alberta - Unaided (N=1,404) Top 4 Responses



A similar trend exists when it comes to taking trips of one week in length or longer. The majority of respondents from all regions state a preference for Hotel/Motel accommodations (40% to 50%), followed by staying with friends and relatives (20% to 26%).

Staying in a camper/fifth wheel/Motorhome is the third most popular choice among respondents from all regions (12% to 22%), with the exception of the Canadian Rockies were there is more of a preference for tenting or a tent trailer (Tent/Tent Trailer - 14% versus Camper/5th Wheel/Motorhome – 9%). (See Figure 13 below).

Figure 13

Q.12B What is your typical choice of accommodation for Week or longer Trips in Alberta - Unaided (N=1,404) Top 4 Responses

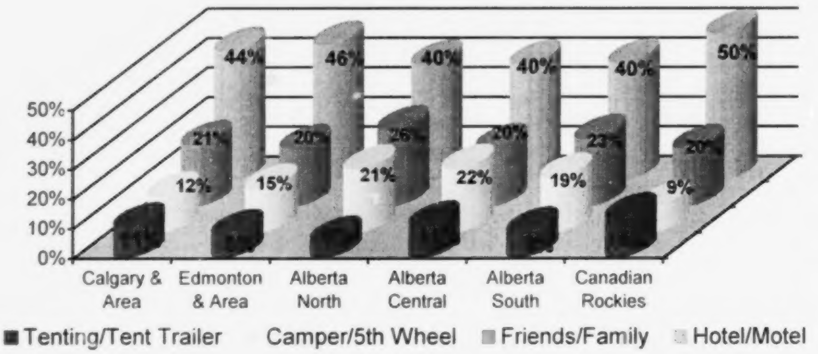
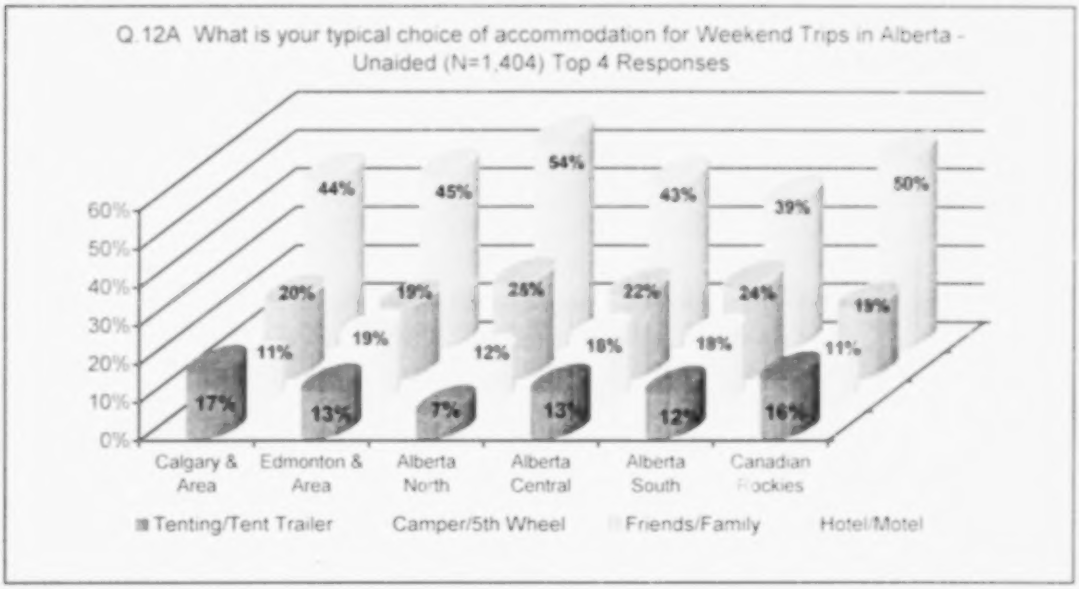


Figure 12

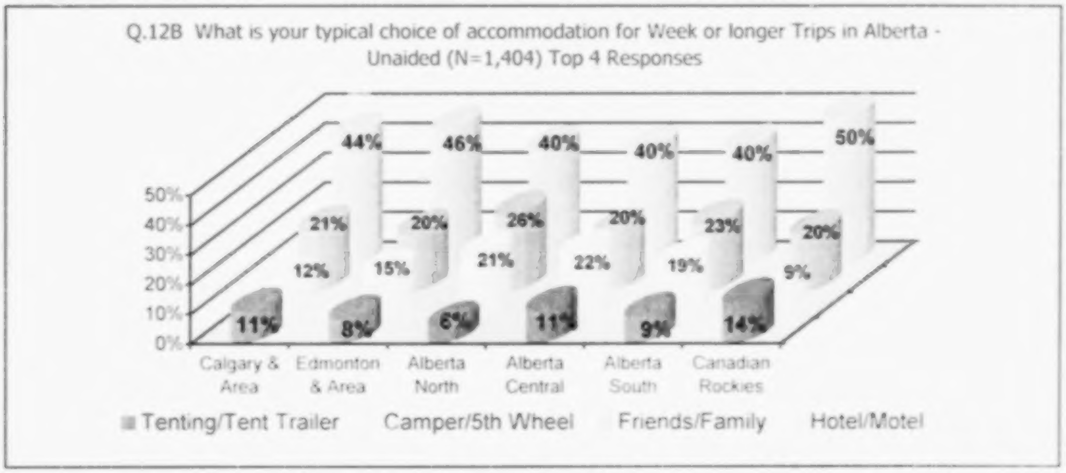


Q.12A What is your typical choice of accommodation for Weekend Trips in Alberta - Unaided (N=1,404) Top 4 Responses

A similar trend exists when it comes to taking trips of one week in length or longer. The majority of respondents from all regions state a preference for Hotel/Motel accommodations (40% to 50%), followed by staying with friends and relatives (20% to 26%).

Staying in a camper/fifth wheel/Motorhome is the third most popular choice among respondents from all regions (12% to 22%), with the exception of the Canadian Rockies were there is more of a preference for tenting or a tent trailer (Tent/Tent Trailer - 14% versus Camper/5th Wheel/Motorhome – 9%). (See Figure 13 below).

Figure 13



Q.12B What is your typical choice of accommodation for Week or longer Trips in Alberta - Unaided (N=1,404) Top 4 Responses

Advertising Recall

Respondents were asked if they recalled seeing, hearing or reading any advertising about travel in the past two to three months.

The highest recall was reported by respondents from Alberta North (59%) and the Canadian Rockies (54%), followed by Alberta Central (49%) and Calgary & Area (45%).

The lowest recall was reported by respondents from Edmonton & Area (38%) and Alberta South (22%).

More than forty percent (42%) overall indicated they could recall travel advertising. However, when asked for specific details of the advertising the response was limited. Because of this a detailed comparative analysis of the differences between the TDR's cannot be sufficiently supported due to the small sample size. A detailed analysis for the results within each TDR has been provided in each of the six regional profiles that follow in this report.

The "Edmonton – Plan on Having Fun Campaign"

The "Edmonton – Plan on having fun" campaign was run from May 12 to May 18, 2003, with three of the six TDR's targeted. Of all respondents, those from Alberta Central (25%) had the highest recall, followed by Alberta North (16%). While Calgary & Area was also a target for this campaign, a very small 5% reported any recall of the campaign. Edmonton & Area (12%), the Canadian Rockies (9%) and Alberta South (7%) were not targeted by the campaign; regardless a small number reported recall of the campaign.

Among the 75 respondents who did recall the campaign, one-third said they had read about the campaign in the newspaper (33%), or in a brochure or pamphlet (30%). Another one-third said they recall seeing the campaign on television (32%). The other media mentioned with respect to this campaign included glossy magazines (4%), radio (2%) and billboards (0.4%). Less than five percent of these respondents could remember where they had seen, heard of read about the campaign (4%).

Approximately 20% of respondents indicated that the campaign made an impact on their travel plans for the next 6 months (18%). This was most frequently said by respondents from Alberta North (37%), Alberta South (33%), and Alberta Central (25%). As well, thirteen percent (13%) of Edmonton & Area respondents indicated the campaign made an impact on their travel plans.

(A detailed analysis of the campaign by TDR can be found in the individual Regional Profiles)

Global Events

Less than 20% of all respondents indicated their travel plans for the next six months have been impacted by recent global events. In terms of events, SARS was named the most frequently, followed by War in Iraq, and 9/11 and terrorism in general. The following results are based on those respondents indicating that they were impacted by these Global events.

Overall, global events were mentioned the most frequently by respondents from the Canadian Rockies (17%), Alberta North (16%) and Edmonton & Area (15%). The impact of global events was mentioned the least often by respondents from Alberta South (14%), Alberta Central (13%) and Calgary & Area (12%).

When asked to identify, in particular, the events that made an impact, the following was reported:

- More than half of Calgary & Area respondents named SARS (67%), followed by the war in Iraq (54%) and 9/11 or terrorism in general (51%).
- More than half of Edmonton & Area respondents named SARS (63%), however, fewer mentioned the war in Iraq (43%) and an even smaller 35% mentioned 9/11 or terrorism in general (35%).
- Alberta North respondents named 9/11 or terrorism in general as the most influential global event (63%), followed by SARS (59%) and the war in Iraq (38%).
- Alberta Central respondents mentioned 9/11 or terrorism in general the most often (68%), followed by the war in Iraq (56%), SARS (48%) and fuel prices (32%).
- Alberta South and Canadian Rockies respondent both named SARS (AB South – 63%, Can. Rockies – 71%), the war in Iraq (AB South – 59%, Can. Rockies – 65%), and 9/11 terrorism in general (AB South – 41%, Can. Rockies – 35%), as the global events with the most impact on their travel plans.

When asked how these events impacted their travel plans, more than 40% of respondents from Alberta South (48%), the Canadian Rockies (47%), Alberta Central (44%), and Alberta North (41%) indicated that they are staying close to home and only traveling in Alberta for the next 6 months as a result. To a lesser degree, respondents from Edmonton & Area (35%) and Calgary & Area (23%) are also staying closer to home in the next six months.

Around a third of respondents from Alberta North (38%), Calgary & Area (37%) and the Canadian Rockies (29%) also reported they are avoiding flying and only driving for the next six months. Again, although to a lesser degree, this was also the case for respondents from Alberta Central (24%), Edmonton & Area (24%), and Alberta South (19%).

Other impact made by global events includes:

- not traveling internationally to the USA, Asia or the Middle East, and nationally to Toronto.
- Switching airlines or cancelled their travel plans all together.
- being more careful, but not enough to change travel plans.

The prospect of West Nile virus appears to have made little impact; with only a few saying they are planning fewer outdoor activities as a result. In contrast, two respondents indicated that due to all of these recent events the lower cost of travel has resulted in more travel for their household. (See Tables 8 and 9 for details on the following page)

Table 8

Q.15A Have any global events made an impact on your travel plans for the next 6 months? (N=1,404)	Total N=1,404	Calgary & Area n=350	Edmonton & Area n=350	Alberta North n=202	Alberta Central n=200	Alberta South n=200	Canadian Rockies n=102
Yes	13.7%	12.3%	15.4%	15.8%	12.5%	13.5%	16.7%
Q.15B Which events in particular have made an impact? (Aided - Multiple Response)(n=198)	**Total (n=198)**	**Calgary & Area n=43**	**Edmonton & Area n=54**	**Alberta North n=32**	**Alberta Central n=25**	**Alberta South n=27**	**Canadian Rockies n=3**
SARS	62.0%	67.4%	63.0%	59.4%	48.0%	63.0%	70.6%
War in Iraq	49.8%	53.5%	42.6%	37.5%	56.0%	59.3%	64.7%
9/11 Terrorism in general	46.9%	51.2%	35.2%	62.5%	68.0%	40.7%	35.3%
Airline Restructuring	11.6%	9.3%	11.1%	9.4%	20.0%	11.1%	0
Fuel Prices	14.2%	9.3%	14.8%	12.5%	32.0%	3.7%	0
West Nile Virus	9.5%	7.0%	11.1%	6.2%	16.0%	3.7%	5.9%
Other	3.4%	2.3%	5.6%	0	4.0%	0	0
‣ Poor exchange rate	(4)		(3)		(1)		
‣ Tough American border	(1)	(1)					
‣ All of the above	(1)		(1)				

Table 9

Q.16 How have these event(s) impacted your travel plans for the next 6 months (Unaided - Multiple Response)(n=198)	Total (n=198)	Calgary & Area n=43	Edmonton & Area n=54	Alberta North n=32	Alberta Central n=25	Alberta South n=27	Canadian Rockies n=3
Staying close to home – in AB	34.6%	23.3%	35.2%	40.6%	44.0%	48.1%	47.1%
Not flying – only driving	28.3%	37.2%	24.1%	37.5%	24.0%	18.5%	29.4%
Taking fewer trips	15.6%	16.3%	16.7%	12.5%	12.0%	18.5%	5.9%
Staying at home – not traveling	7.2%	7.0%	9.3%	0	4.0%	7.4%	11.8%
Other	37.2%	51.2%	37.0%	31.2%	32.0%	11.1%	5.9%
‣ Not traveling Internationally	(19)	(10)	(5)	(1)	(2)	(1)	
‣ Not traveling to Toronto	(10)	(4)	(5)	(1)			
‣ Being careful but still traveling	(10)	(6)	(1)		(2)	(1)	
‣ Not traveling to the US	(8)	(4)	(1)	(1)	(2)		(1)
‣ Not traveling to Asia	(7)	(1)	(5)				
‣ Delayed/Cancelled plans	(7)	(1)	(4)	(1)	(1)		
‣ Not traveling to the Middle East	(4)	(1)	(3)				
‣ Not going outside	(3)	(1)	(1)				
‣ Changed Airlines	(3)	(1)			(1)		
‣ Traveling more - lower cost	(1)			(1)		(1)	

Demographics

Household Composition	Overall N=1,404	Calgary & Area n=350	Edmonton & Area n=350	Alberta North n=202	Alberta Central n=200	Alberta South n=200	Canadian Rockies n=102
Single Parent with Children	4.8%	4.3%	5.7%	4.5%	5.0%	3.0%	9.8%
Single Adult No Children	15.6%	14.9%	18.0%	9.4%	14.0%	16.0%	8.8%
2 Adults with Children	39.6%	40.9%	37.1%	50.5%	39.5%	40.5%	32.4%
2 Adults No Children	36.4%	36.0%	35.1%	33.2%	38.5%	38.5%	45.1%
3 or more Adults No Children	2.7%	3.1%	2.9%	1.5%	2.5%	1.5%	3.9%
3 or more Adults with Children	0.4%	0.6%	0.6%	1.0%	0	0	0
Refused	0.4%	0.3%	0.6%	0	0.5%	0.5%	0

Age	Overall N=1,404	Calgary & Area n=350	Edmonton & Area n=350	Alberta North n=202	Alberta Central n=200	Alberta South n=200	Canadian Rockies n=102
18 to 24 years	12.2%	12.6%	11.7%	10.4%	11.5%	14.0%	11.8%
25 to 34 years	19.4%	22.3%	14.9%	23.3%	22.5%	16.0%	30.4%
35 to 44 years	19.7%	18.6%	21.7%	27.2%	14.5%	22.5%	19.6%
45 to 54 years	22.0%	22.0%	23.1%	23.8%	23.0%	16.5%	17.6%
55 to 64 years	12.9%	12.0%	14.3%	8.4%	13.0%	14.0%	6.9%
65 years or older	9.1%	7.4%	9.7%	4.5%	12.0%	10.5%	4.9%
Refused	4.8%	5.1%	4.6%	2.5%	3.5%	6.5%	8.8%

Income	Overall N=1,404	Calgary & Area n=350	Edmonton & Area n=350	Alberta North n=202	Alberta Central n=200	Alberta South n=200	Canadian Rockies n=102
Less than $25,000	8.8%	7.4%	8.0%	5.9%	10.5%	14.5%	4.9%
$25,000 to $49,999	29.0%	31.4%	23.7%	20.8%	32.0%	35.5%	34.3%
$50,000 to $99,999	31.7%	27.1%	38.0%	33.7%	32.0%	25.5%	31.4%
$100,000 and over	13.1%	17.1%	12.3%	28.2%	6.5%	7.0%	12.7%
Don't know	3.3%	3.4%	2.0%	1.5%	5.5%	3.5%	5.9%
Refused	14.2%	13.4%	16.0%	9.9%	13.5%	14.0%	10.8%

Are you currently an AMA Member?	Overall N=1,404	Calgary & Area n=350	Edmonton & Area n=350	Alberta North n=202	Alberta Central n=200	Alberta South n=200	Canadian Rockies n=102
Yes	46.3%	47.7%	48.9%	41.1%	40.5%	45.5%	38.2%
No	52.5%	50.6%	50.3%	58.4%	58.0%	53.5%	60.8%
Don't know/Refused	1.3%	1.7%	0.9%	0.5%	1.5%	1.0%	1.0%

Gender	Overall N=1,405	Calgary & Area n=350	Edmonton & Area n=350	Alberta North n=202	Alberta Central n=200	Alberta South n=200	Canadian Rockies n=102
Male	43.7%	43.4%	44.9%	38.1%	36.5%	58.0%	21.6%
Female	56.3%	56.6%	55.1%	61.9%	63.5%	42.0%	78.4%

4.0 PROFILES OF VISITOR ORIGIN

As a value-added component of the report, the following Flow Maps detail the origin of the Visitor to each of the six Tourism Destination Regions. These maps should assist the Partnership and the DMO's to better understand the composition of intended visitors to each of the TDR's over the next 6 months.

Figure 14 – Flow Map of Intended Visitors to **Calgary & Area Destinations***

**Please note that these results do not take into account the frequency of planned visits to each key destination*

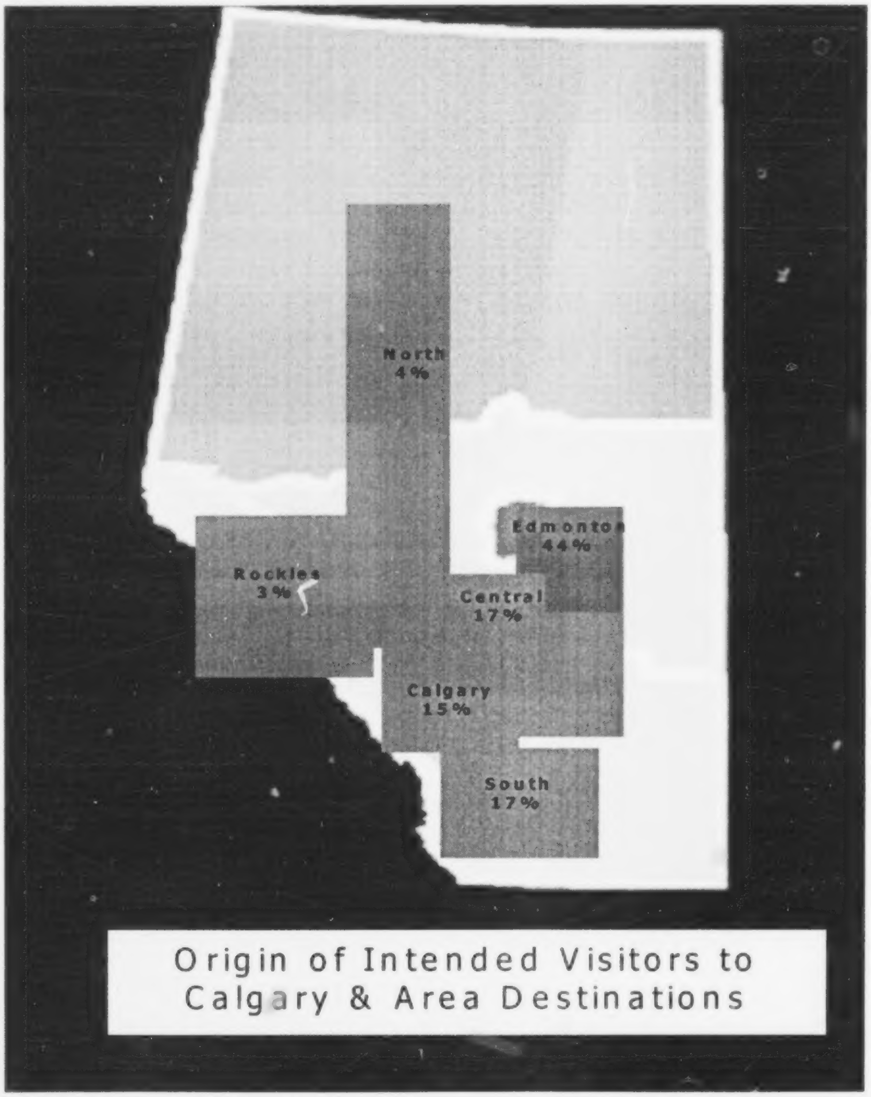
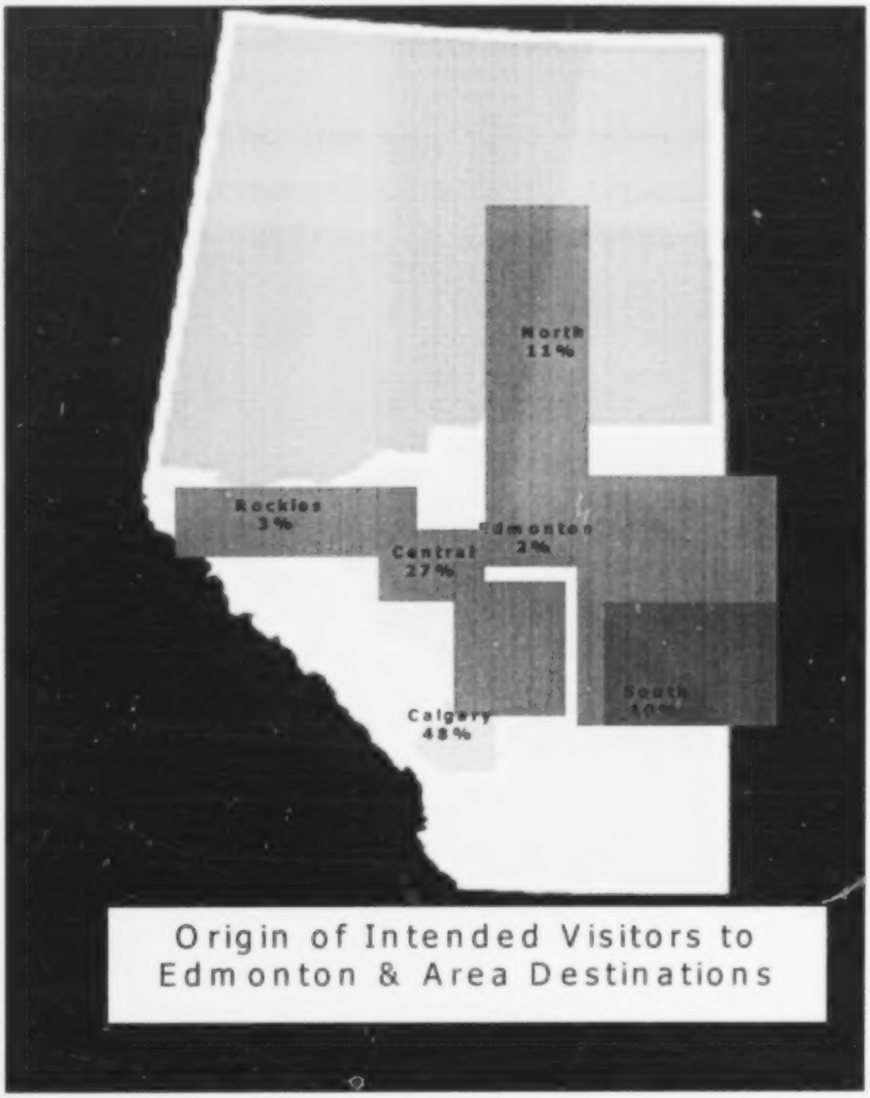

North
4%
Edmonton
44%
Rockies
3%
Central
17%
Calgary
15%
South
17%
Origin of Intended Visitors to Calgary & Area Destinations

Figure 15 – Flow Map of Intended Visitors to **Edmonton & Area** Destinations*

**Please note that these results do not take into account the frequency of planned visits to each key destination*


North
11%
Rockies
3%
Edmonton
2%
Central
27%
Calgary
48%
South
Origin of Intended Visitors to Edmonton & Area Destinations

4.0 PROFILES OF VISITOR ORIGIN

As a value-added component of the report, the following Flow Maps detail the origin of the Visitor to each of the six Tourism Destination Regions. These maps should assist the Partnership and the DMO's to better understand the composition of intended visitors to each of the TDR's over the next 6 months.

Figure 14 – Flow Map of Intended Visitors to **Calgary & Area Destinations***

**Please note that these results do not take into account the frequency of planned visits to each key destination*

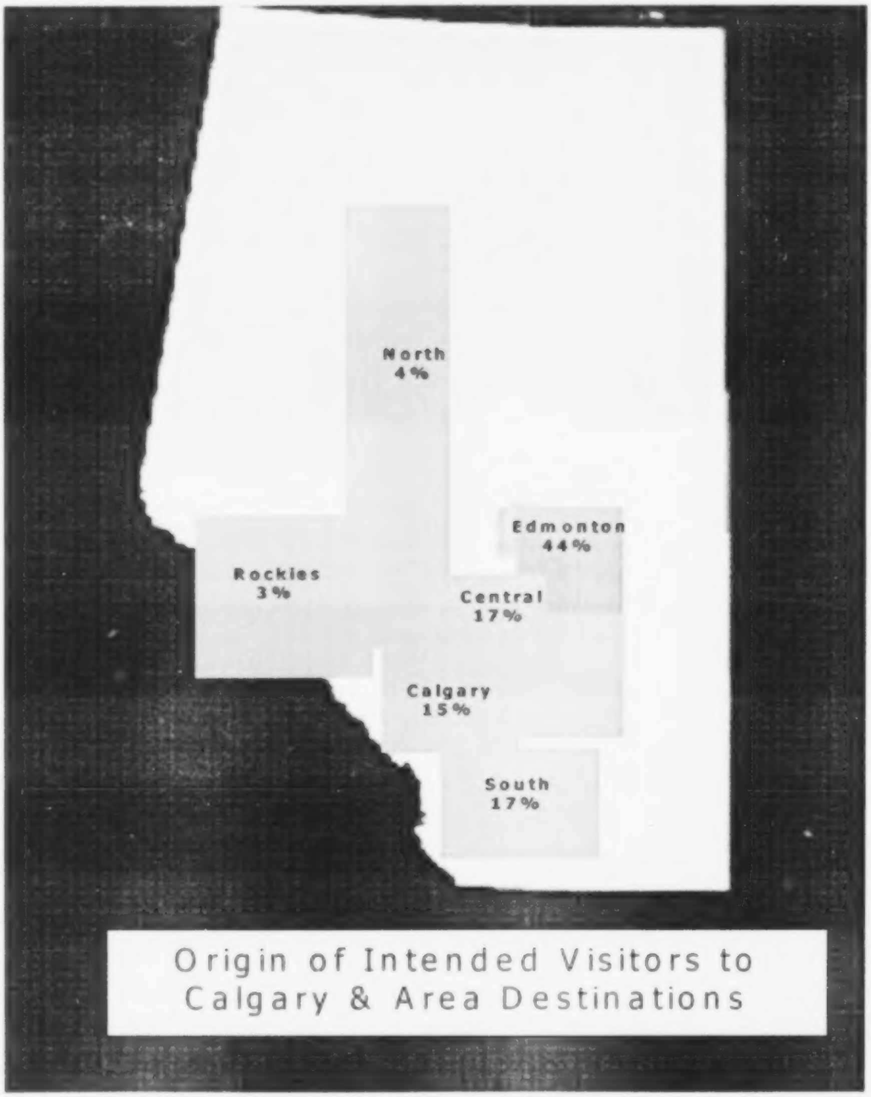

North
4%
Edmonton
44%
Rockies
3%
Central
17%
Calgary
15%
South
17%
Origin of Intended Visitors to Calgary & Area Destinations

Figure 15 – Flow Map of Intended Visitors to **Edmonton & Area** Destinations *

**Please note that these results do not take into account the frequency of planned visits to each key destination*

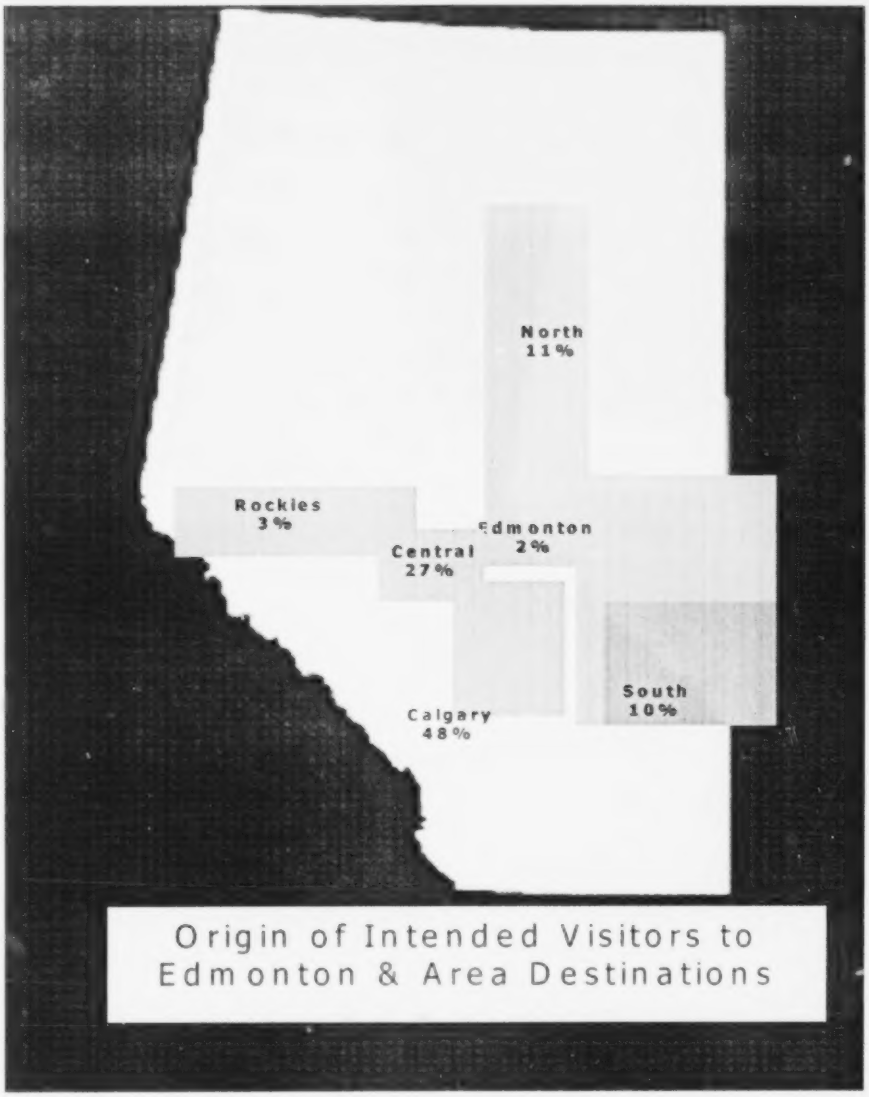

North
11%
Rockies
3%
Edmonton
2%
Central
27%
Calgary
48%
South
10%
Origin of Intended Visitors to
Edmonton & Area Destinations

Figure 16 – Flow Map of Intended Visitors to **Alberta North** Destinations*

**Please note that these results do not take into account the frequency of planned visits to each key destination*

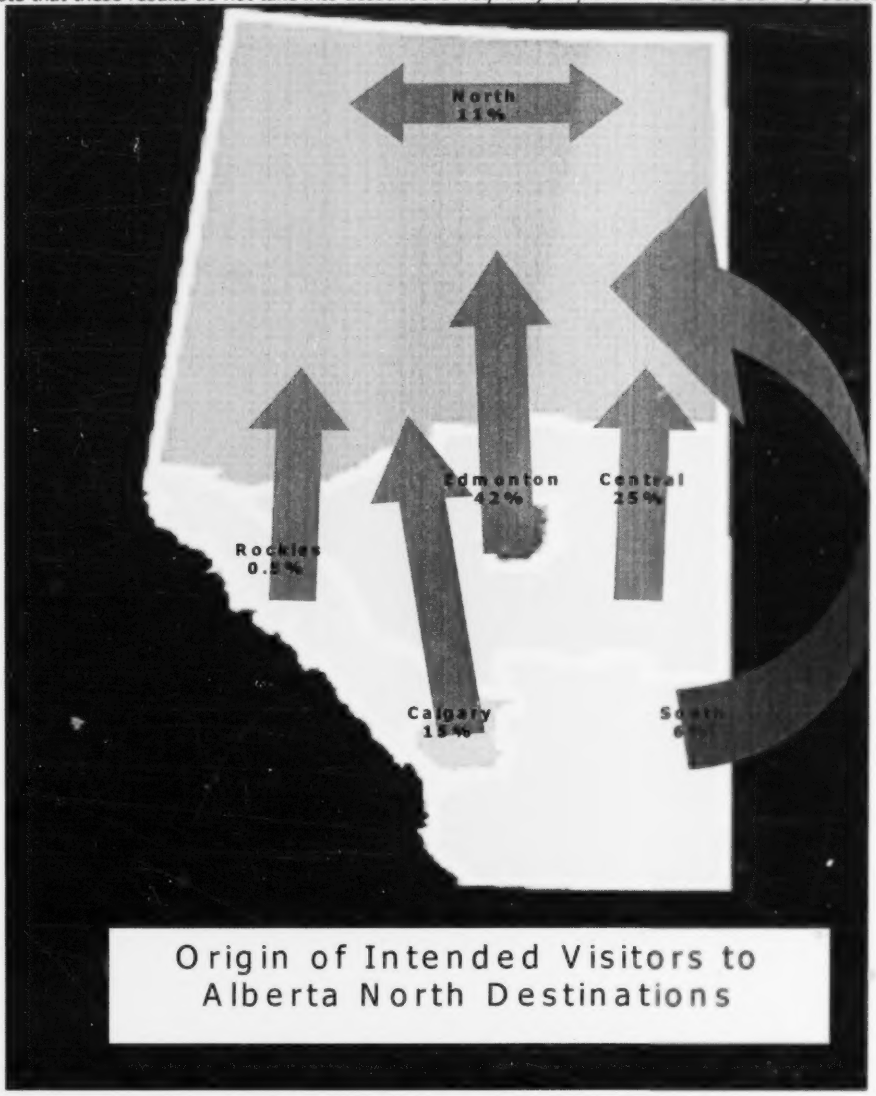

North
11%
Edmonton
42%
Central
25%
Rockies
0.5%
Calgary
15%
South
6%
Origin of Intended Visitors to Alberta North Destinations

Figure 17 – Flow Map of Intended Visitors to **Alberta Central** Destinations*

**Please note that these results do not take into account the frequency of planned visits to each key destination*

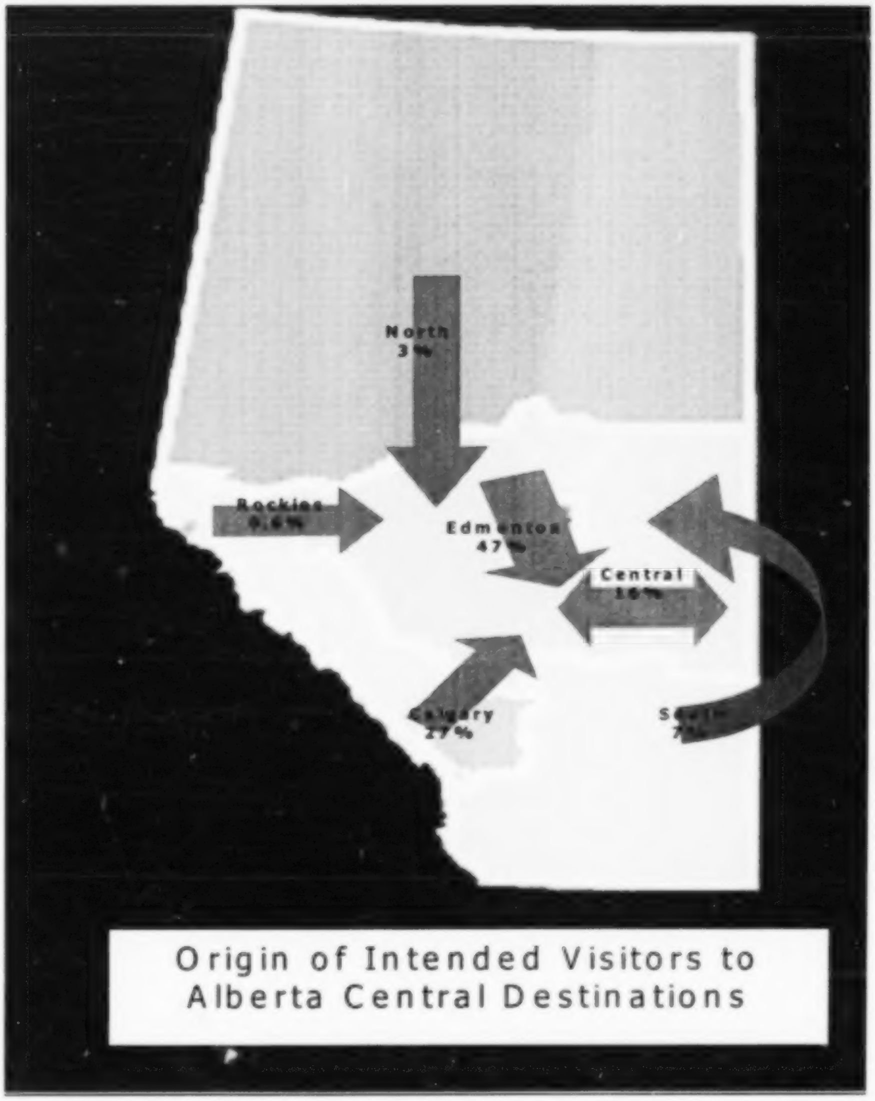

North
3%
Rockies
0.6%
Edmonton
47%
Central
16%
Calgary
27%
South
7%
Origin of Intended Visitors to
Alberta Central Destinations

Figure 16 – Flow Map of Intended Visitors to **Alberta North** Destinations*

**Please note that these results do not take into account the frequency of planned visits to each key destination*

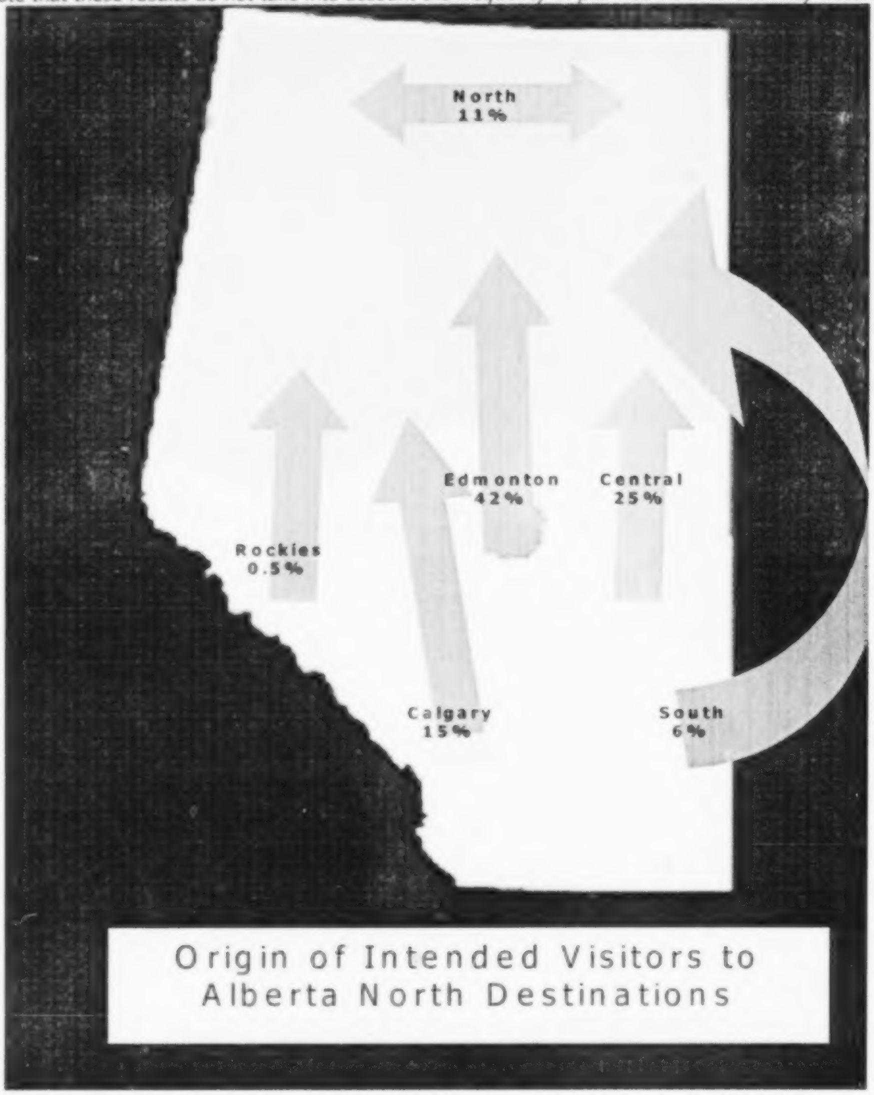

North 11%
Edmonton 42%
Central 25%
Rockies 0.5%
Calgary 15%
South 6%
Origin of Intended Visitors to Alberta North Destinations

Figure 17 – Flow Map of Intended Visitors to **Alberta Central** Destinations*

**Please note that these results do not take into account the frequency of planned visits to each key destination*

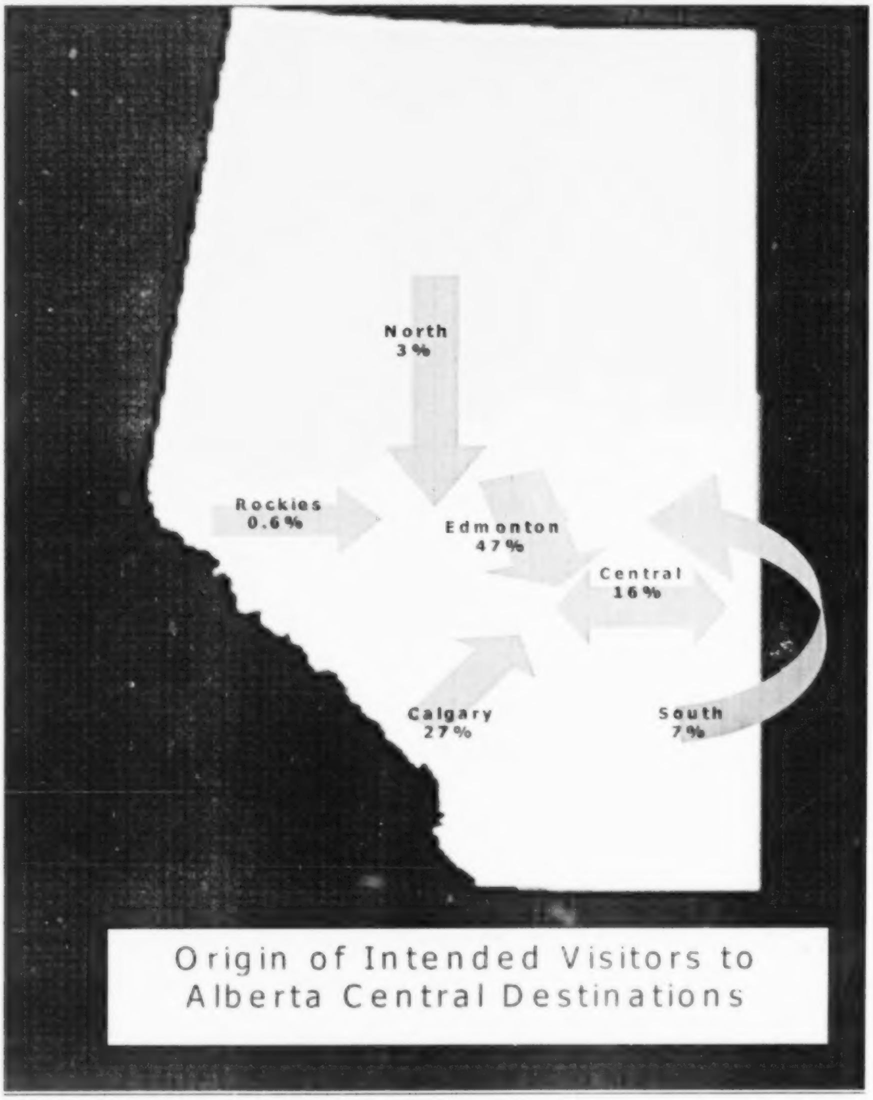

North
3%
Rockies
0.6%
Edmonton
47%
Central
16%
Calgary
27%
South
7%
Origin of Intended Visitors to Alberta Central Destinations

Figure 18 – Flow Map of Intended Visitors to **Alberta South** Destinations*

**Please note that these results do not take into account the frequency of planned visits to each key destination*

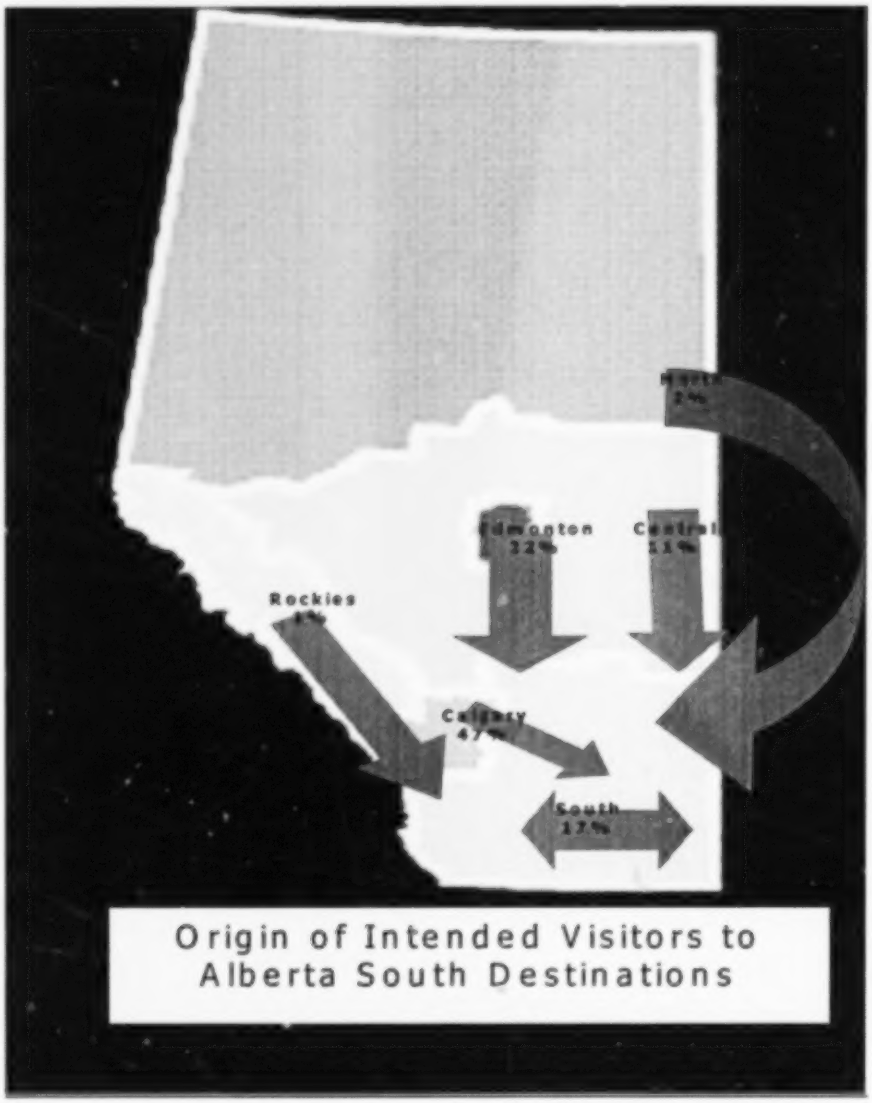

North
2%
Edmonton
32%
Central
11%
Rockies
Calgary
47%
South
17%
Origin of Intended Visitors to Alberta South Destinations

Figure 19 – Flow Map of Intended Visitors to **Canadian Rockies** Destinations*

**Please note that these results do not take into account the frequency of planned visits to each key destination*

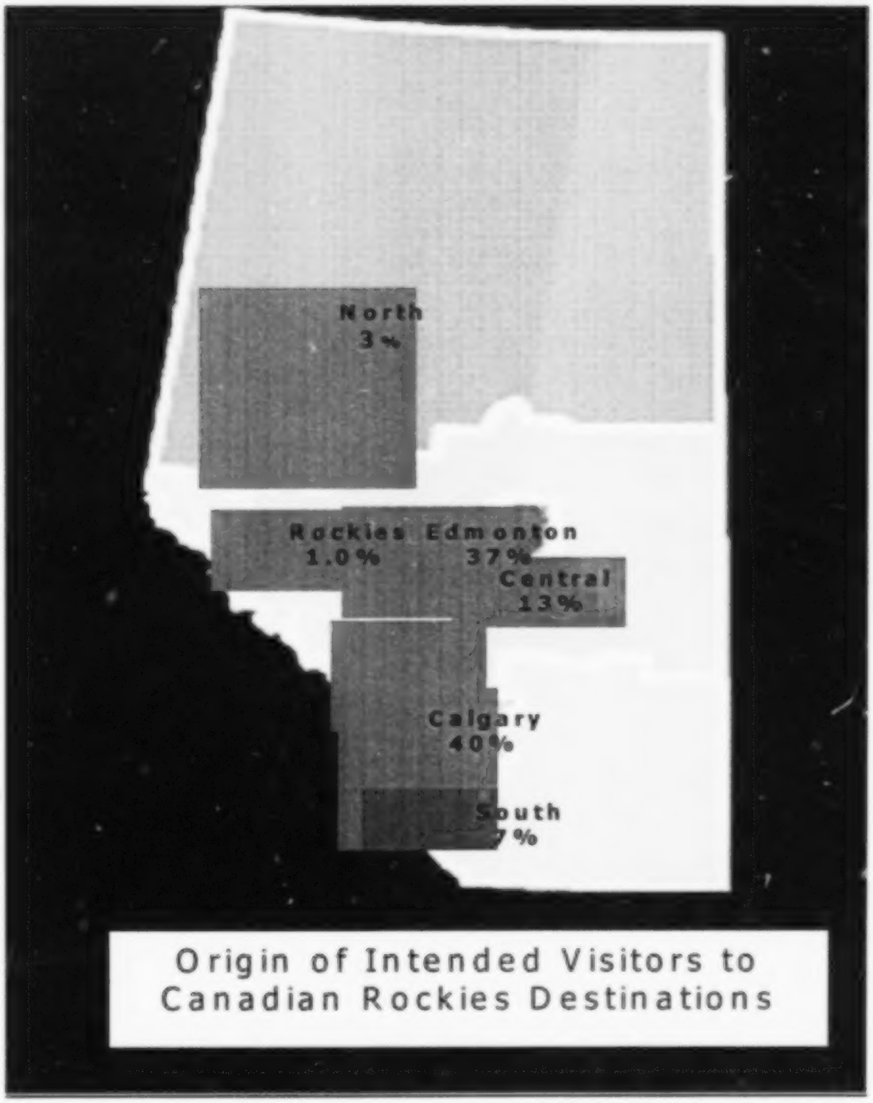

North
3%
Rockies
1.0%
Edmonton
37%
Central
13%
Calgary
40%
South
7%
Origin of Intended Visitors to Canadian Rockies Destinations

Figure 18 – Flow Map of Intended Visitors to **Alberta South** Destinations*

**Please note that these results do not take into account the frequency of planned visits to each key destination*

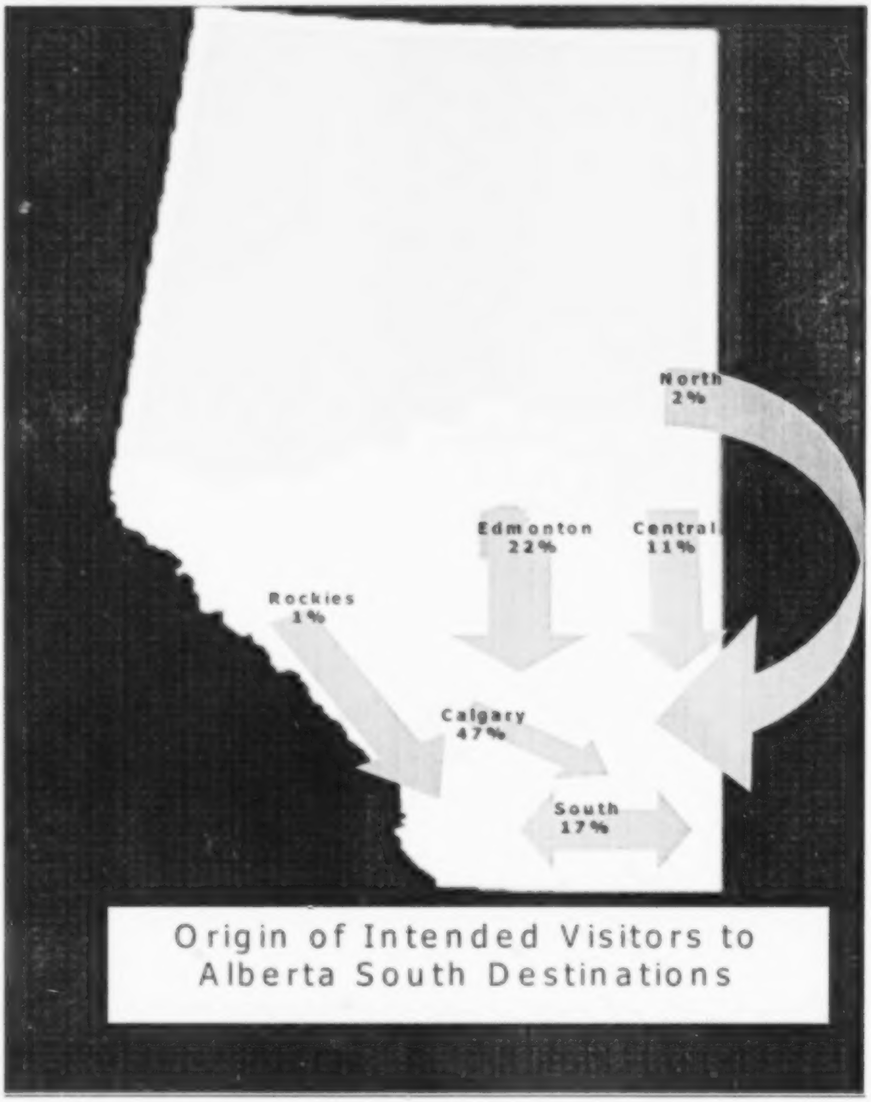
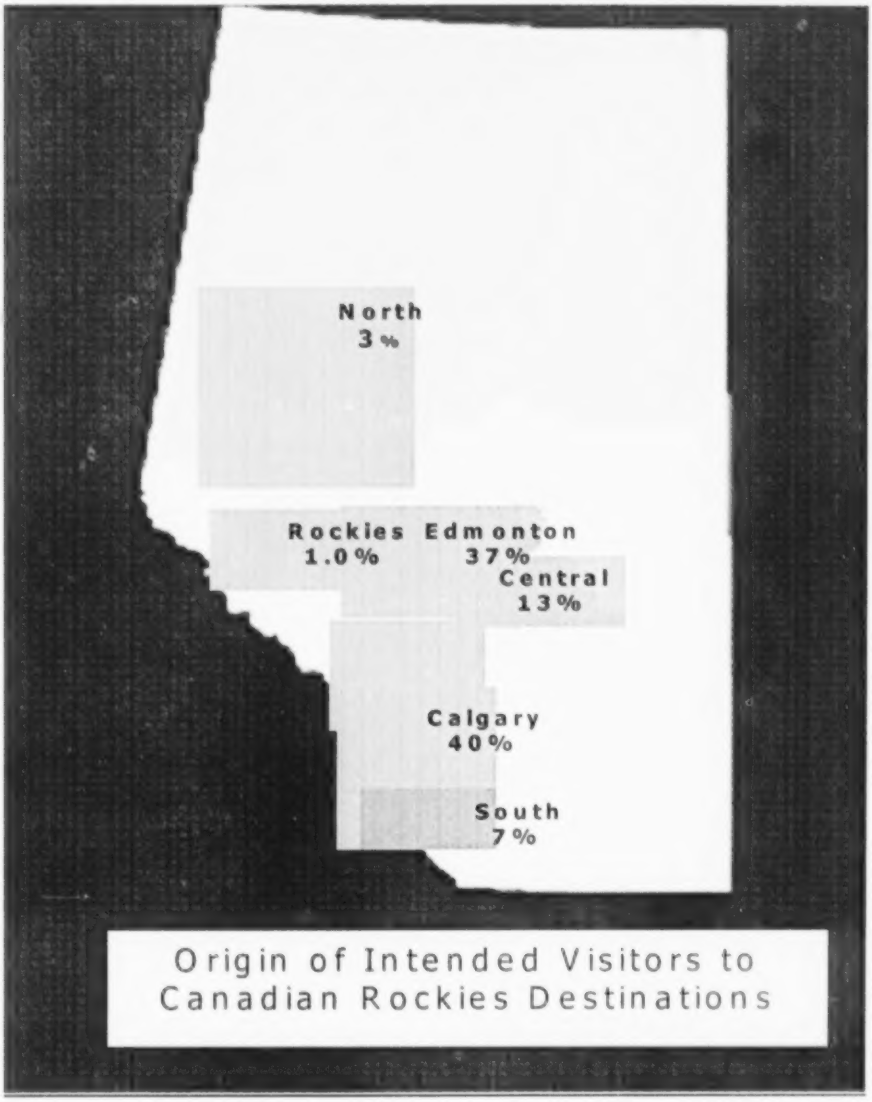

North
2%
Edmonton
22%
Central
11%
Rockies
1%
Calgary
47%
South
17%
Origin of Intended Visitors to Alberta South Destinations

Figure 19 – Flow Map of Intended Visitors to **Canadian Rockies** Destinations*

**Please note that these results do not take into account the frequency of planned visits to each key destination*


North
3%
Rockies
1.0%
Edmonton
37%
Central
13%
Calgary
40%
South
7%
Origin of Intended Visitors to Canadian Rockies Destinations

5.0 Calgary & Area Respondent Profile

A total of 350 interviews were conducted with Calgary & Area respondents in May 2003. As the final data set has been weighted to better reflect the actual population distribution of the province of Alberta, these 350 interviews represent 482 interviews when weighting has been applied.

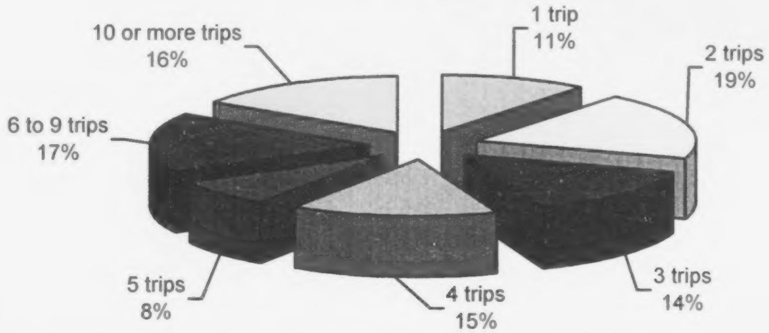
Intended Trips

The number of planned trips among Calgary & Area respondents over the next six months range from one (1) to 30 trips, with these respondents averaging 5.3 trips over the next 6 months. This mean, along with the mean number of trips for Edmonton & Area respondents, is one of the lowest among all TDR's.

The number of respondents taking between one to five trips over the next six months is evenly distributed, with twenty percent and less of respondents planning to take one trip (11%), two trips (20%), three trips (14%), four trips (15%) or five trips (8%). Seventeen percent of respondents plan on taking between six and nine trips in the next six months, while the remaining 16% plan to take from 10 to 60 trips over the next six months. (Figure 20 below)

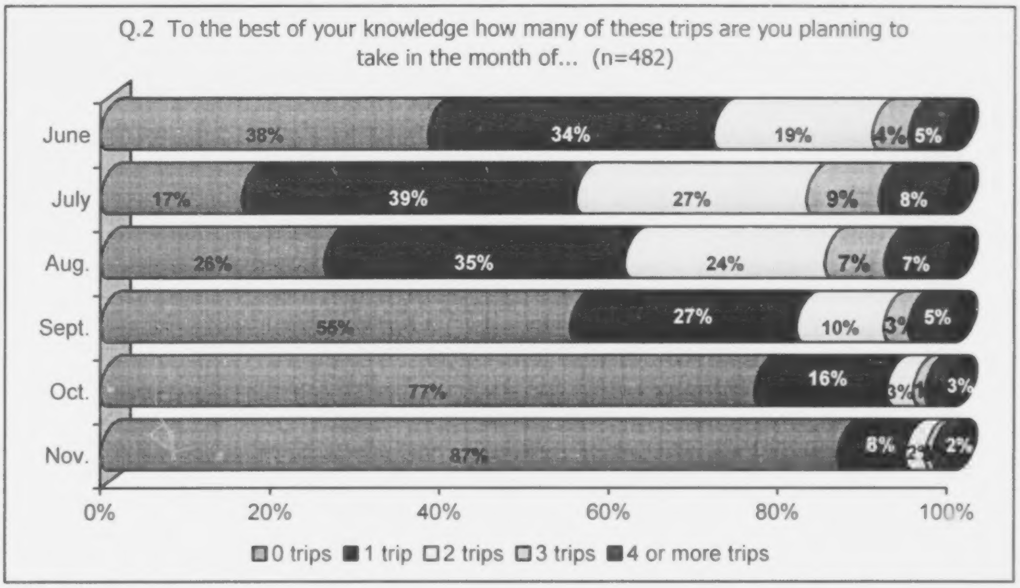
Figure 20

Q.1 How many leisure trips does your household plan to take between June 1 and Nov. 30, 2003?
Calgary & Area Respondents (n=482)



When asked to indicate how many of these trips will be taken within specific months over the next six months, three-quarters or more of respondents said they are planning one or more trips during July (83%) and/or in August (74%). Sixty-one percent (61%) of respondents said they are planning one or more trips during June, and over forty percent are planning one or more trips for September (44%). Almost a quarter of respondents plan to take one or more trips during October (23%), while thirteen percent plan to take one or more trips during November (13%) 2003. (See Figure 21 on the following page)

Figure 21



When looking at the specific months of travel for the 1,863 trips planned by Calgary & Area respondents over the next 6 months, the highest number are planned for the months of July (29%) and August (26%), and twenty percent (20%) of these trips are planned for June and 14% for September. Fewer trips are planned for October (7%) and November (4%). (Figure 22 below)

Figure 22

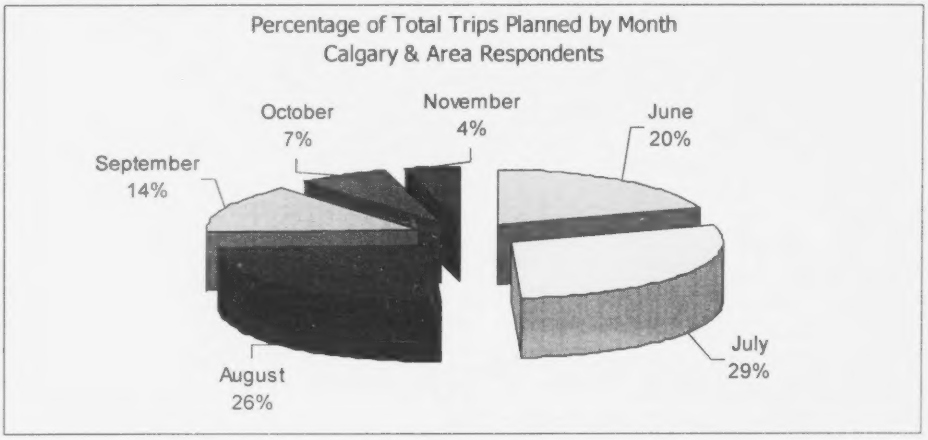
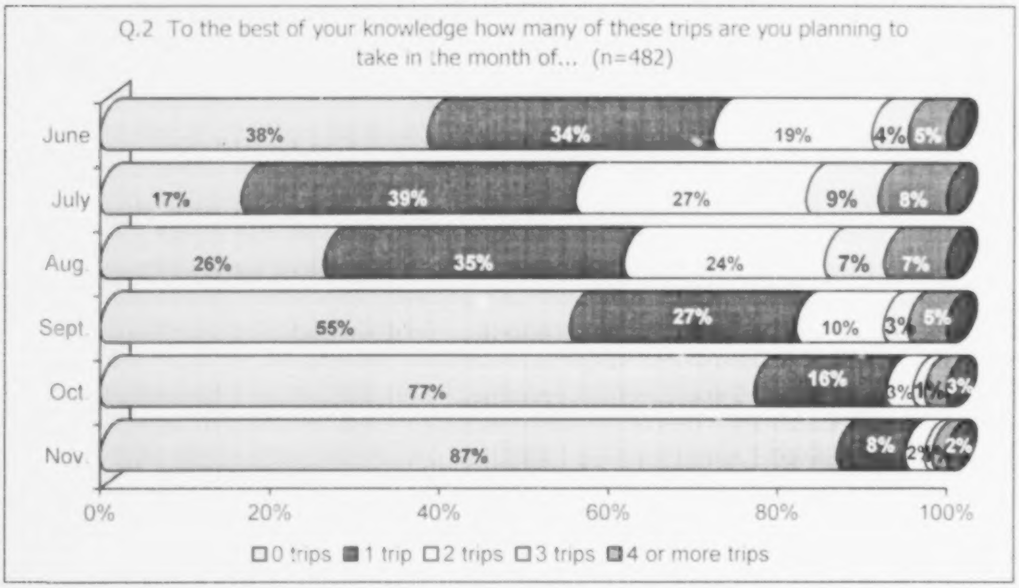
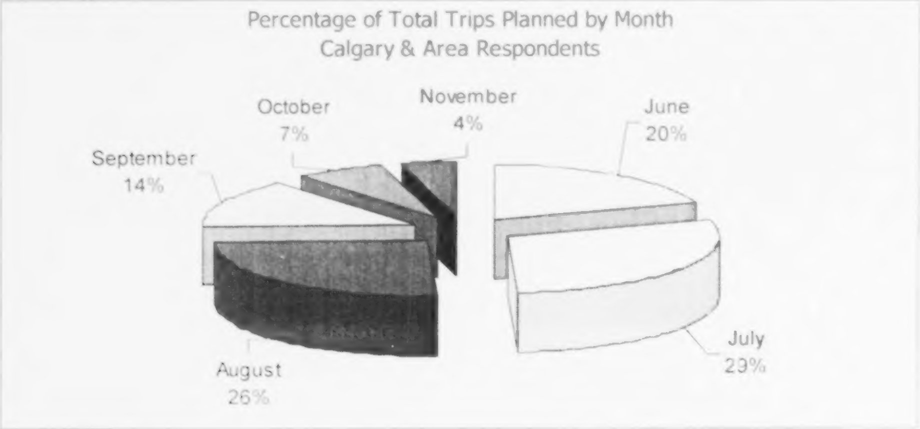


Figure 21



When looking at the specific months of travel for the 1,863 trips planned by Calgary & Area respondents over the next 6 months, the highest number are planned for the months of July (29%) and August (26%), and twenty percent (20%) of these trips are planned for June and 14% for September. Fewer trips are planned for October (7%) and November (4%). (Figure 22 below)

Figure 22



Respondents were asked to distinguish between their in-province trips and trips outside of Alberta: (See Figure 23 and Figure 24 below)

In-Province Travel

- The majority of Calgary & Area respondents (79%) plan to travel within the province over the next six months.
- 19% will take at least one (1) leisure trip in Alberta over the next 6 months.
- Almost half (49%) plan to take three or less trips over the next six months within Alberta.
- Almost a third (30%) plan on taking four or more trips within Alberta between June 1 and November 30th.

Of all Regions, Calgary & Area respondents are the least likely to have intentions to travel within Alberta, with the highest proportion of respondents who said they are not planning any trips within the province (21%) in the next six months. (See Figure 23 below)

Outside Alberta (See Figure 24 below).

When asked about their plans to travel outside of Alberta, some 19% of Calgary & Area respondents do not intend to leave Alberta for leisure trips over the next six months. Of the 81% who do intend to take leisure trips outside the province over the next 6-months:

- 30% are planning one trip
- 24% are planning 2 trips,
- 11% are planning 3 trips
- The remaining 16% intend to take between four and ten or more trips outside of the province

Of all Regions, Calgary & Area respondents are the most likely to plan trips outside of Alberta over the next 6 months.

Figure 23
Q.3A How many of these trips will be within Alberta? Calgary & Area Respondents (n=482)

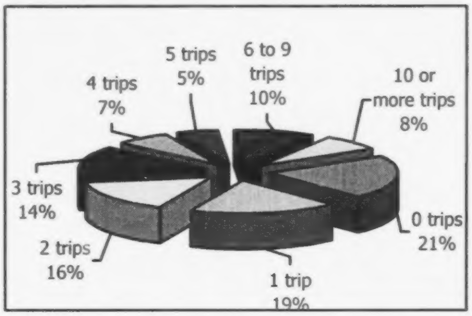
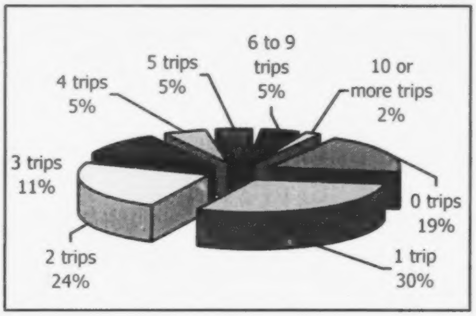


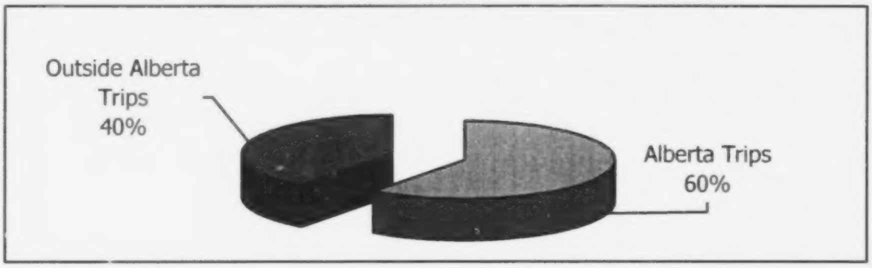
Figure 24
Q.3B How many of these trips will be outside of Alberta? Calgary & Area Respondents (n=482)



Destinations

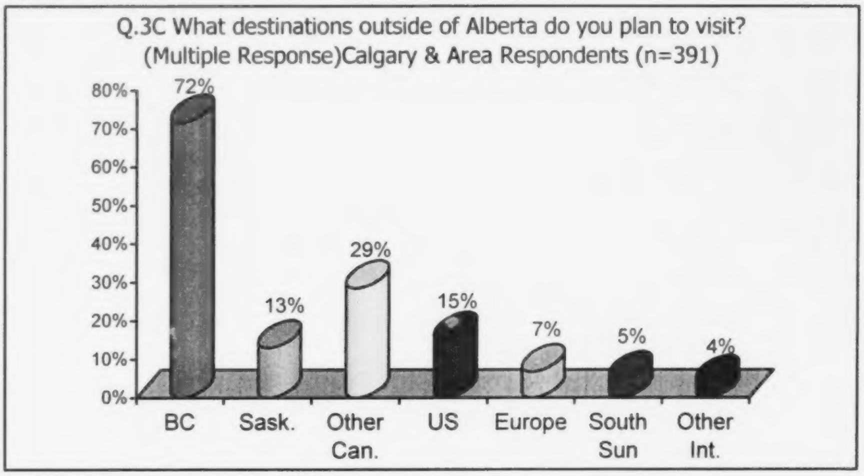
Overall, Of the 1,863 trips planned by Calgary & Area respondents, sixty percent (60%) of these trips are to destinations within Alberta. (Figure 25 below)

Figure 25 Percentage of Total Trips Planned by Destination
Calgary & Area Respondents (N=1,863 Trips)



When asked about intended destinations outside of Alberta, travel within Canada dominates; in particular travel to British Columbia (72%). This is followed by travel to other areas of Canada (29%), and to Saskatchewan (13%). Outside of Canada, travel to the USA was named by 15% of respondents, and a much smaller 7% or less are planning trips to Europe (7%), Southern Sun destinations (5%), or other International areas (4%). (Figure 26 below)

Figure 26



Reasons for no travel within Alberta

More than half (52%) of all Calgary & Area respondents who are not planning any leisure trips within Alberta over the next six months indicated they have *"no particular reason"* for not traveling within the province. Another 21% said they have *"no interest in traveling in Alberta, and prefer destinations outside Alberta"*. 'Other' reasons given for not planning travel in Alberta are detailed in Table 10 on the following page.

Table 10

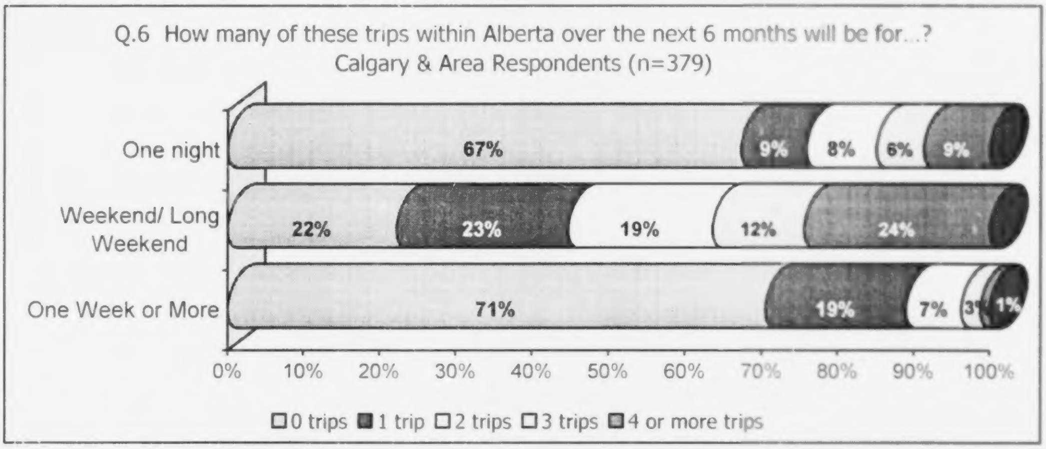
Q.4 Is there any particular reason why you do not intend to make any leisure trips in Alberta in the next 6 months (Multiple Response)	**Calgary & Area Respondents n=103**
No particular reason	52.0%
No interest/prefer destinations outside Alberta	21.3%
No money – financial	5.3%
Nothing new to do or see in Alberta	4.0%
No time – too busy	1.3%
Other;	17.3%
• Relatives live outside Alberta	(11)
• Bad Weather in Alberta	(3)
• Vacation property located outside Alberta	(3)
• Moving out of the province	(1)

In-Province Travelers (n=379)

Calgary & Area in-province travelers indicated their 2003 travel intentions are either the same (66%) as in 2002, or have increased (20%) for 2003 (Q.5). Fifteen percent (15%) said they plan to travel less in 2003 within the province than they did in 2002.

More than three-quarters (78%) intend to take one or more weekend/long weekend trips over the next six months, one-third or more plan to take one or more overnight trips (33%), or trips of one week in length or longer (38%). (Figure 27)

Figure 27



Of the 1,124 Alberta trips planned by Calgary & Area respondents, almost two-thirds (64%) will be weekend or long weekend trips. The remaining trips planned within Alberta by these respondents will be for one night only (24%) or for one week or longer (12%). (Figure 28 on the following page)

Table 10

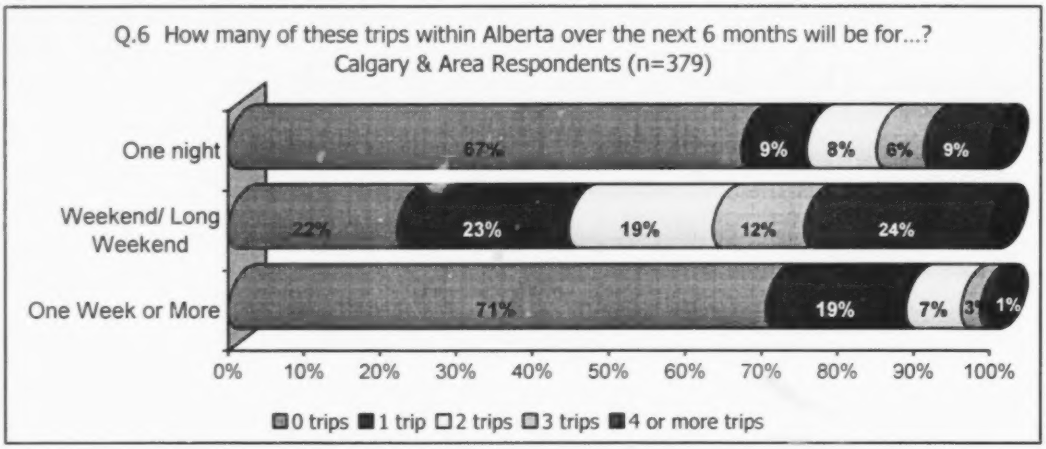
Q.4 Is there any particular reason why you do not intend to make any leisure trips in Alberta in the next 6 months (Multiple Response)	**Calgary & Area Respondents n=103**
No particular reason	52.0%
No interest/prefer destinations outside Alberta	21.3%
No money – financial	5.3%
Nothing new to do or see in Alberta	4.0%
No time – too busy	1.3%
Other;	17.3%
• Relatives live outside Alberta	(11)
• Bad Weather in Alberta	(3)
• Vacation property located outside Alberta	(3)
• Moving out of the province	(1)

In-Province Travelers (n=379)

Calgary & Area in-province travelers indicated their 2003 travel intentions are either the same (66%) as in 2002, or have increased (20%) for 2003 (Q.5). Fifteen percent (15%) said they plan to travel less in 2003 within the province than they did in 2002.

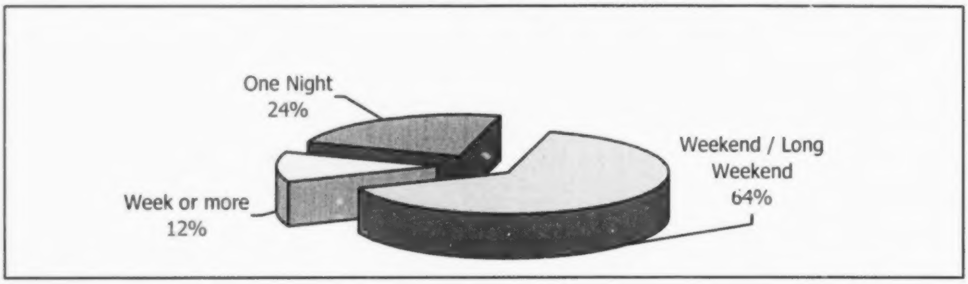
More than three-quarters (78%) intend to take one or more weekend/long weekend trips over the next six months, one-third or more plan to take one or more overnight trips (33%), or trips of one week in length or longer (38%). (Figure 27)

Figure 27



Of the 1,124 Alberta trips planned by Calgary & Area respondents, almost two-thirds (64%) will be weekend or long weekend trips. The remaining trips planned within Alberta by these respondents will be for one night only (24%) or for one week or longer (12%). (Figure 28 on the following page)

Figure 28 Percentage of Total Alberta Trips Planned by Trip Length
Calgary & Area Respondents (N=1,124 Trips)



Travel Party Size and Planning Trips

Travel party size for weekend trips and trips of one week or longer over the next six months is expected to be in the range of one to six persons, with the average travel group being two and three persons.

The range of days needed to plan weekend trips within Alberta falls between less than 1 day up to three months, and for week or longer trips falls between less than 1 day to a full year. Overall for this group of respondents, the average number of days required to plan weekend trips (15.8 days), is less than half the time required to plan trips of one week or more in the province (36.7 days).

When the regions were compared, it was found that Calgary & Area respondents take more time to plan trips within the province than respondents from Alberta South and the Canadian Rockies, and less time than respondents from Edmonton & Area, Alberta Central and Alberta North.

The most frequently reported time period for planning weekend trips by Calgary & Areas respondents is 7 days (38%), while the more typical planning time frame for trips of a week or longer is one month (20%). (Table 11 below)

Table 11

Q.7 How many members of your household will be traveling on... (Calgary & Area Respondents)	Range	Mean (weighted)	Mode (weighted)	Not Applicable (weighted)*
A. Weekend trips (n=364)	**1 to 6**	**2.56 persons**	**2 persons (41.5%)**	**n=15**
B. Trips of one week or longer (n=320)	**1 to 6**	**2.52 persons**	**2 persons (35.3%)**	**n=59**
Q.8 How many days in advance do you typically plan leisure trips within Alberta for...	**Range**	**Mean (weighted)**	**Mode (weighted)**	**Not Applicable (weighted)***
A. Weekend trips (n=367)	**0 to 90**	**15.8 days**	**7 days (37.8%)**	**n=12**
B. Trips of one week or longer (n=312)	**0 to 365**	**36.7 days**	**30 days (20.4%)**	**n=67**

**These respondents indicated they do not typically take trips of this length when traveling in Alberta*

Specific Destinations in the Province

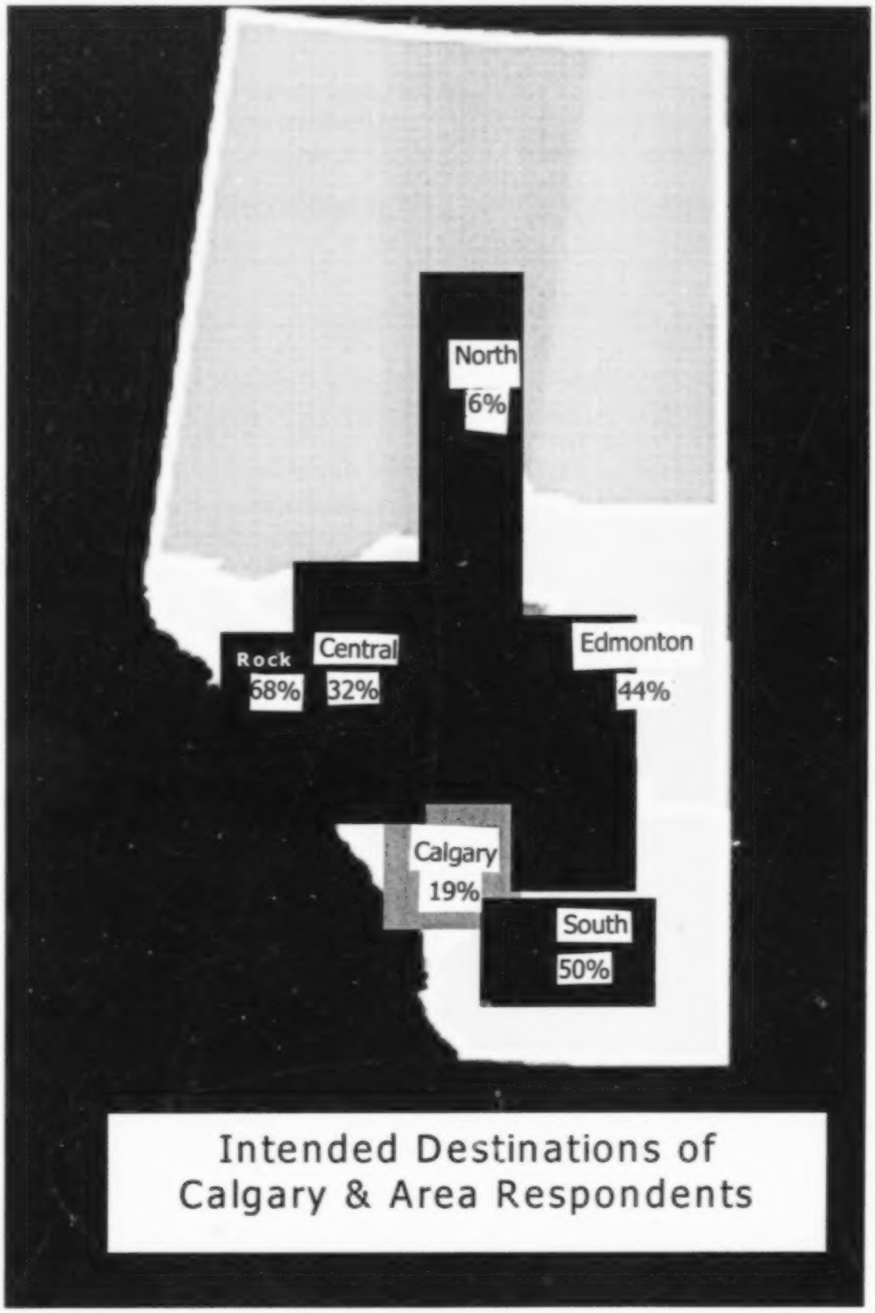
When respondents were asked about the in-province destinations they plan to visit over the next six months, the most named destinations are the Canadian Rockies Region (68%), followed by trips to Alberta South (50%) and to Edmonton & Area (44%).

Over the next six months, around a third of Calgary & Area respondents intend to travel to Alberta Central (32%), and 19% plan to visit destinations within the Calgary & Area Region. A very small number (6%) are planning to take trips to the Alberta North region.

(A Flow Map depicting the planned travel from this Region is noted as Figure 29 on the following page)

Figure 29 – Flow Map of Calgary & Area Respondents Intended Destinations*

**Please note that these results do not take into account the frequency of planned visits to each key destination*


North
6%
Rock
68%
Central
32%
Edmonton
44%
Calgary
19%
South
50%
Intended Destinations of Calgary & Area Respondents

Activities

Respondents were asked to indicate how likely they are to participate in a variety of activities while on leisure trips over the next six months. The most popular activity for the Calgary & Area respondents is *visiting family and friends* (52% - very likely to participate in this activity); this results in a mean of 3.3 out of 4.

Three (3) of the remaining 16 activities were also indicated by the majority of respondents as activities they would be very likely to participate in over the next six months. These activities include Outdoor Summer Sports (mean= 3.2 out of 4), Outdoor Leisure (mean=3.1 out of 4) and Outdoor Recreation (mean=3.1 out of 4).

Six (6) of the activity types are activities they are more likely to participate in than not, and reflect a mean ranging from 2.8 to 2.1. These include: Indoor leisure activities (2.8 out of 4), Calgary Stampede & Klondike days (2.7 out of 4), Museums & historical sites (2.6 out of 4), Festivals & cultural activities (2.4 out of 4), Attractions (2.2 out of 4) and Spectator sports & Entertainment (2.1 out of 4).

Less popular activities, with the least likelihood for participation, include Outdoor Winter Sports (2.0 out of 4), Organized Sports Events (2.0 out of 4), Spas & other Health Club (2.0 out of 4), Team Sports (1.9 out of 4), Aboriginal Attractions (1.7 out of 4), and Outdoor Adventure activities (1.7 out of 4). (See Table 12 below)

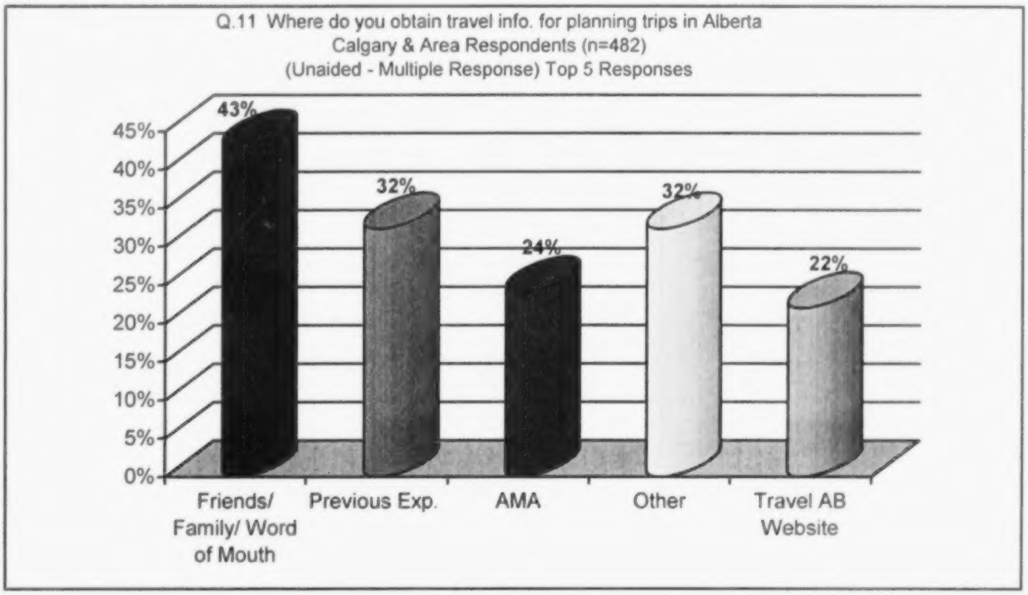
Table 12

Q.10 Activities Calgary & Area Respondents (n=482)	Likelihood of Participating in...					Mean
	Very Unlikely	Somewhat Unlikely	Somewhat Likely	Very Likely	Don't Know	
Visit Friends & Relatives	8.0%	5.1%	35.1%	51.7%	0.1%	3.3
Outdoor Summer Sports	13.4%	3.1%	33.4%	49.7%	0.3%	3.2
Outdoor Leisure	12.9%	4.3%	43.1%	39.7%	0	3.1
Outdoor Recreation	16.0%	5.7%	32.0%	46.3%	0	3.1
Indoor Leisure Activities	19.4%	10.6%	40.6%	29.1%	0.3%	2.8
Calgary Stampede/ Klondike Days	28.3%	8.0%	28.0%	35.7%	0	2.7
Museums & Historical Sites	23.4%	16.0%	33.7%	26.0%	0.9%	2.6
Festivals & Cultural Activities	33.1%	17.4%	26.6%	22.9%	0	2.4
Attractions	40.9%	16.6%	21.4%	20.6%	0.6%	2.2
Spectator Sports & Entertainment	46.0%	16.0%	20.3%	17.7%	0	2.1
Outdoor Winter Sports	52.9%	14.6%	12.9%	19.7%	0	2.0
Organized Sports Events	48.6%	19.7%	18.3%	13.4%	0	2.0
Spas & Other Health Club	49.1%	17.4%	21.1%	12.0%	0.3%	2.0
Team Sports	53.4%	15.4%	17.7%	13.1%	0.3%	1.9
Aboriginal Attractions	53.7%	24.0%	14.9%	6.9%	0.6%	1.7
Outdoor Adventure	60.3%	18.0%	15.4%	6.3%	0	1.7

Information Sources

When Calgary & Area respondents were asked about the information sources they rely on when planning trips within Alberta, the most frequently mentioned source is *friends, family* or *word-of-mouth* (43%). Close to a third rely on previous experience (32%), and close to a quarter rely on the AMA (24%) or the Travel Alberta website (22%). Another third named a variety of other sources (32%), including, the Internet in general, books, maps, or travel agents. (Figure 30 below)

Figure 30



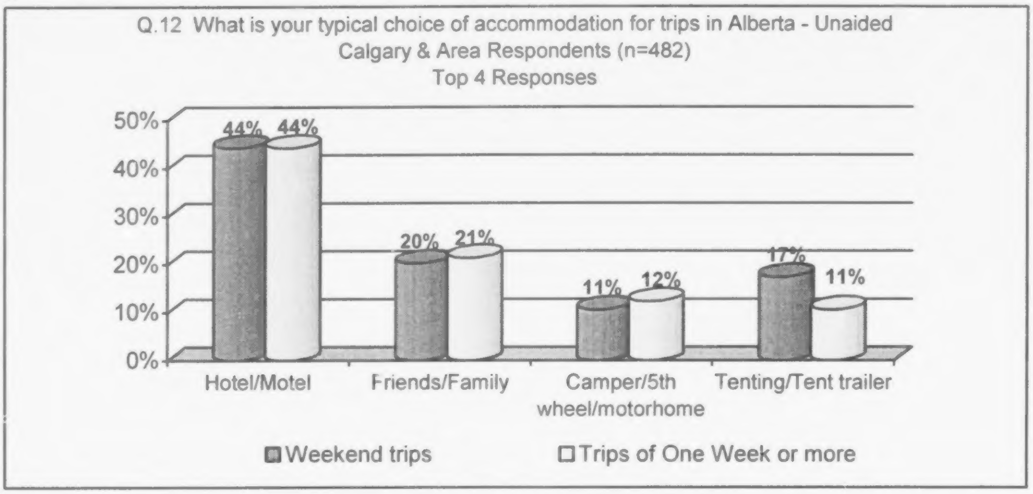
Accommodations

Few differences exist among these respondents when it comes to the typical choice of accommodations for either a weekend trip or trips of one week or longer.

- Forty-four percent (44%) choose to stay in hotels/motels
- Twenty percent (20%) or more would stay with friends or family
- Twelve percent (12%) of respondents would use a Camper/5th wheel or Motorhome when on trips of one week or longer, with fewer choosing this type of accommodation for weekend trips (11%).
- Seventeen percent (17%) of respondents choose to tent or use a tent trailer on weekend trips, which is the highest of all regions.
- Eleven percent (11%) would choose to tent or use a tent trailer on trips one week or longer.

(See Figure 31 on following page)

Figure 31



Advertising Recall

Respondents were asked if they could recall seeing, hearing or reading any advertising about travel in the previous two to three months. More than forty percent (45%) indicated they could recall such advertising. However, when asked about specific details of this advertising the response was limited.

The media source with the most recall was television (25%), followed by newspapers (14%) and brochures (14%). Although to a much lesser degree, 'other sources' included various other magazines (9%), radio (4%) and the AMA travel magazine (3%).

Destinations they recall being advertised are coded into the six Tourism Destination Regions (TDR). The most frequent recall is for destinations located in the Canadian Rockies (20%), followed by Calgary & Area destinations (9%) and Edmonton & Area destinations (6%). Advertising for the other Regions had a less than four percent recall rate.

Only a few respondents were able to provide specific content of the advertising they could recall. The most frequent recall was about activities in general (7%), camping (6%), the Calgary Stampede (6%), sight-seeing (5%), and golf (3%) ads.

Travel Alberta was identified the most often (15%) as the sponsor of the advertising, followed by the AMA (3%), and the Calgary Stampede (3%). All other sponsors were mentioned by less than one percent. (Table 13 on the following page)

Table 13

Q.13B Please describe the advertising...(Unaided - Multiple Response)
Calgary & Area Respondents (n=219)
Top 6 responses per category

Media Source		**Destinations**		**Activities**		**Sponsor**	
TV	24.5%	Can. Rockies	20.1%	Activities in general	7.3%	Travel Alberta	14.5%
Newspaper	13.8%	Calgary & area	8.8%	Camping	6.3%	AMA	3.1%
Brochures	13.8%	Edm. & Area	5.7%	Calgary Stampede	5.7%	Calgary Stampede	3.1%
Other magazine	8.5%	Alberta South	3.1%	Sight-seeing	4.9%	Greyhound	0.6%
Radio	3.8%	Alberta Central	1.9%	Golf	3.1%		
AMA magazine	3.1%	Alberta North	1.3%	Shopping	2.5%		
Do not recall	**31.4%**	**Do not recall**	**59.1%**	**Do not recall**	**67.9%**	**Do not recall**	**78.6%**

The *"Edmonton – Plan on Having Fun"* Campaign

Calgary & Area was one of the target groups for the "Edmonton – Plan on having fun" campaign run from May 12, 2003 to May 18, 2003. Of the 159 Calgary & Area respondents who recalled advertising during the previous two to three months, a very small five percent (5%) reported any recall of this campaign (8 respondents in total). Of the eight (8) respondents, four (4) recalled seeing the campaign on television, two (2) in the newspaper and one (1) from a pamphlet. One (1) lone respondent could not remember where they saw, read or heard the advertising.

None of the respondents who recalled the campaign indicated it had any impact on their travel plans for the next 6 months.

Global Events

Twelve percent (12%) of Calgary & Area respondents reported their travel plans for the next six months had been impacted by recent global events. Of those, the most frequently named event was the SARS outbreak (67%), followed by the war in Iraq (54%) and the 9/11 events or terrorism in general (51%).

Fuels prices (19%), airlines restructuring (9%), the West Nile Virus (7%) or other global events (such as; poor exchange rate, tough entrance to the American border) were mentioned by fewer (2%).

When asked how these events had impacted their travel plans, around a third indicated they *"are not flying, only driving for their leisure travel"* (37%) or they "*are staying close to home, in Alberta"* (27%). A smaller sixteen percent of respondents indicated they are "*taking fewer trips overall*" (16%), and an even smaller group of 7% indicated they are staying at home and not traveling as often in general.

Others from the Calgary & Area region reported that global events have stopped them from traveling internationally to the USA, and to Asia or the Middle East, or nationally to Toronto. Some have switched airlines or cancelled their travel plans all together.

Others said that recent global events have resulted in them being more careful, but that these events were not enough of a concern for them to change their travel plans. Only a very small 7% said The West Nile virus caused them to plan less outdoor activities. (Table 14)

Table 14 – Calgary & Area Respondents (n=482)

Q.15A Have any global events made an impact on your travel plans for the next 6 months?			
Yes	12.3%	No	87.7%
Q.15B Which events in particular had an impact? (Aided - Multiple Response)? Calgary & Area Respondents (n=43)		**Q.16 How has this/these event(s) impacted your travel plans for the next 6 months (Unaided - Multiple response) Calgary & Area Respondents (n=43)**	
SARS	67.4%	Not flying – only driving	37.2%
War in Iraq	53.5%	Staying close to home – in AB	23.3%
9/11 Terrorism in general	51.2%	Taking fewer trips	16.3%
Fuel prices	9.3%	Staying at home – not traveling	7.0%
Airline restructuring	9.3%	Other;	51.2%
West Nile Virus	7.0%	• Not traveling internationally	(10)
Other	2.3% (1)	• Being careful but still traveling	(6)
• Tough American border	(1)	• Not going to Toronto	(4)
		• Not traveling to US	(4)
		• Not traveling to Asia	(1)
		• Delayed/cancelled plans	(1)
		• Not traveling to Middle East	(1)
		• Not going outside (West Nile)	(1)
		• Switched airlines	(1)

Demographics

Q.17 Family Composition		**Q.18 Age**	
Single parent with children	4.3%	18 to 24 years	12.6%
Single Adult Household	14.9%	25 to 34 years	22.3%
2 Adults with Children	40.9%	35 to 44 years	18.6%
2 Adults without Children	36.0%	45 to 54 years	22.0%
3 or more Single Adults without children	3.1%	55 to 64 years	12.0%
3 or more Single Adults with Children	0.6%	65 or older	7.4%
Refused	0.3%	Refused	5.1%
Q.19 Income		**Q.20 Are you currently an AMA member?**	
Less than $25,000	7.4%	Yes	47.7%
$25,000 to $49,999	31.4%	No	50.6%
$50,000 to $99,999	27.1%	Don't Know	1.1%
$100,000 and over	17.1%	Refused	0.6%
Refused	13.4%		
Q.21 Gender			
Male	43.4%		
Female	56.6%		

6.0 Edmonton & Area Respondent Profile

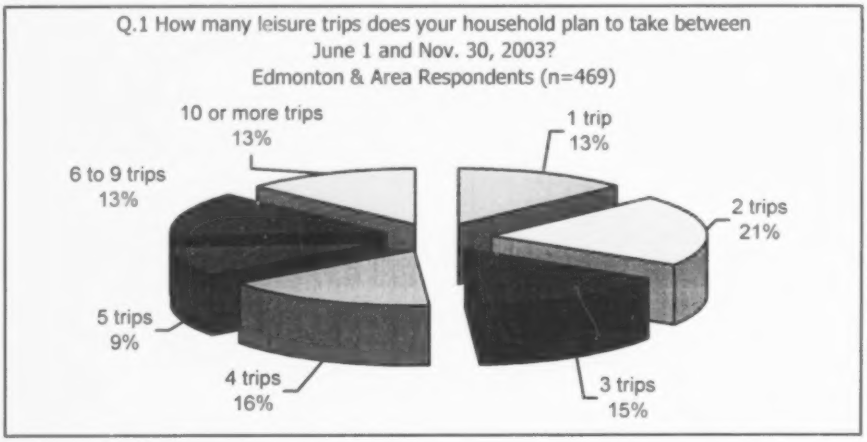
A total of 350 interviews were conducted with Edmonton & Area respondents in May 2003. As the final data set has been weighted to better reflect the actual population distribution of the province of Alberta, these 350 interviews represent 469 interviews when weighting has been applied.

Intended Trips

The number of planned trips among Edmonton & Area respondents over the next six months ranged from one (1) to 36 trips, with these respondents averaging 5.0 trips over the next 6 months. This mean is the lowest of all TDR's.

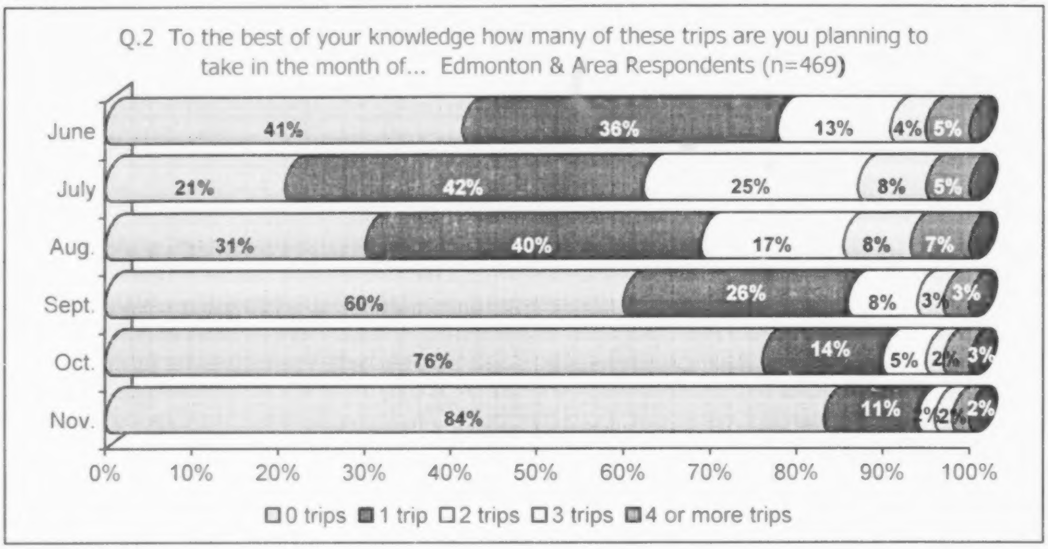
The number of respondents taking between one to five trips over the next six months is evenly distributed with twenty-one percent or less of respondents planning to take one trip (13%), two trips (21%), three trips (15%), four trips (16%) or five trips (9%). Thirteen percent (13%) of respondents plan on taking between six and nine trips over the next six months, while the remaining 13% plan to take anywhere from ten to thirty-six trips over the next six months. (Figure 32 below)

Figure 32



When asked to indicate how many of these trips will be taken within specific months over the next six months, over three-quarters of respondents said they are planning one or more trips in July (79%) and/or 69% in August. Fifty-nine percent (59%) of respondents said they are planning one or more trips in June, while forty percent (40%) said they are planning one or more trips in September. Just slightly under a quarter plan to take one or more trips in October (24%), and a smaller 16% plan to take one or more trips in November. (Figure 33 on the following page)

Figure 33



When looking at the specific months of travel for the 1,746 trips planned by Edmonton & Area respondents over the next 6 months, the highest number are planned for the months of July (27%) and August (25%). Nineteen percent (19%) of these trips are planned for June and 13% are planned for September. Fewer trips are planned for October (9%) and November (6%). (Figure 34 below)

Figure 34

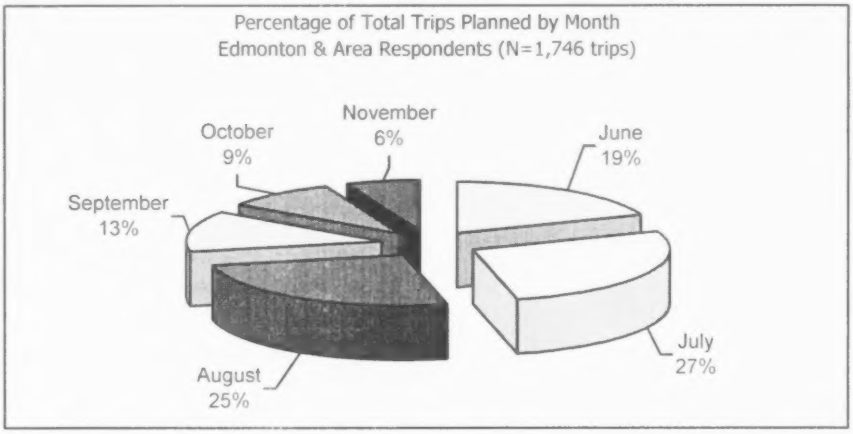
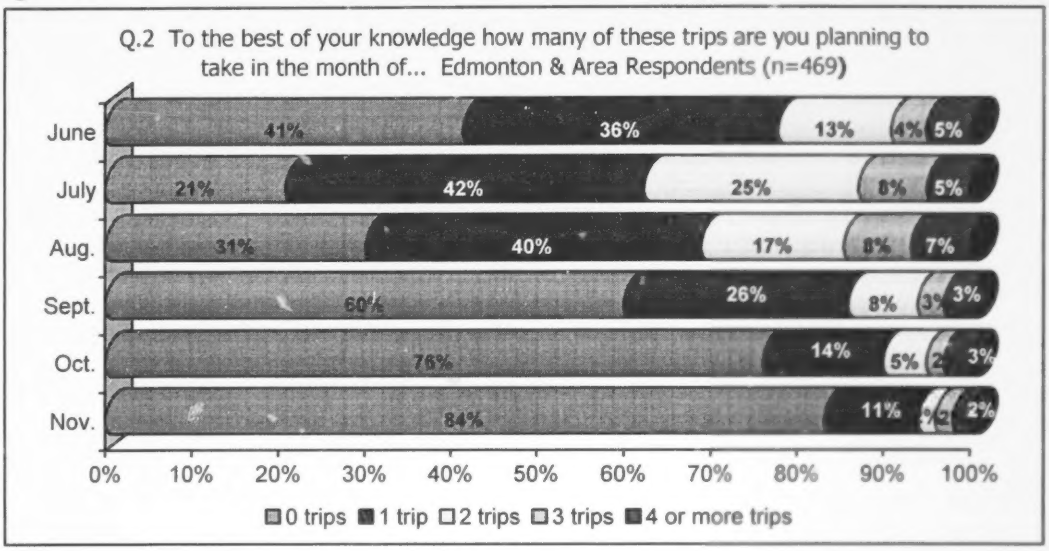
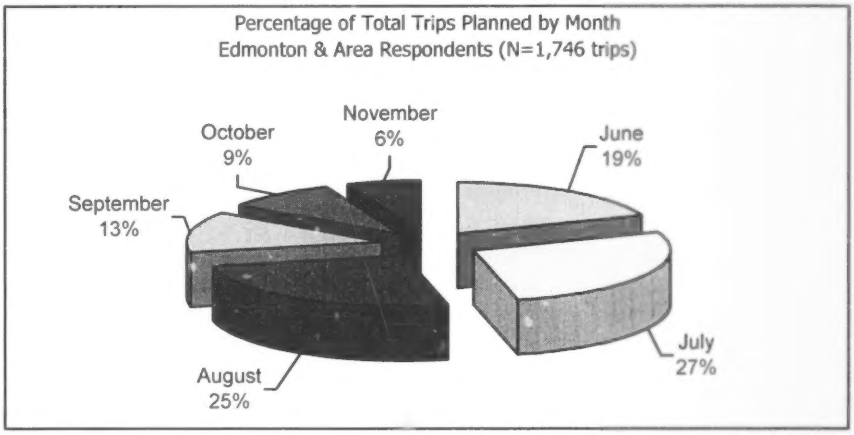


Figure 33



When looking at the specific months of travel for the 1,746 trips planned by Edmonton & Area respondents over the next 6 months, the highest number are planned for the months of July (27%) and August (25%). Nineteen percent (19%) of these trips are planned for June and 13% are planned for September. Fewer trips are planned for October (9%) and November (6%). (Figure 34 below)

Figure 34



Respondents were asked to distinguish between their in-province trips and trips outside of Alberta. (See Figure 35 and Figure 36 below)

In-Province Travel (See Figure 35 below)

- The majority of Edmonton & Area respondents (85%) intend to take at least one leisure trip within the province over the next 6 months.
- More than half (53%) plan to take three or less trips over the next six months
- The remaining one-third (32%) plan on taking four or more trips within Alberta between June 1 and November 30th.

Of all Regions, Edmonton & Area respondents are the second least likely to travel within Alberta over the next six months, next to respondents in Calgary & Area. Again, next to Calgary & Area, this Region also had the second highest proportion of respondents who said they are not planning any trips within the province (15%) over the next six months.

Outside Alberta (see Figure 36 below)
When asked about their plans to travel outside of Alberta, 33% of Edmonton & Area respondents said they do not intend to leave Alberta for leisure trips over the next six months. Of the 66% who do intend to travel outside of Alberta on leisure trips over the next six months:

- 33% are planning one trip
- 21% are planning 2 trips
- 6% are planning 3 trips
- The remaining seven (7%) intend to take between four and ten or more trips

Figure 35
Q.3A How many of these trips will be within Alberta? Edmonton & Area Respondents (n=469)

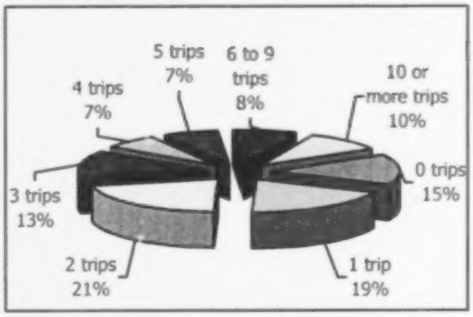
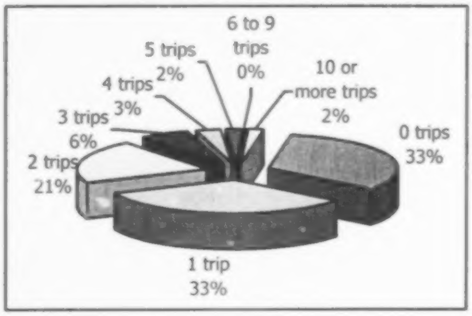


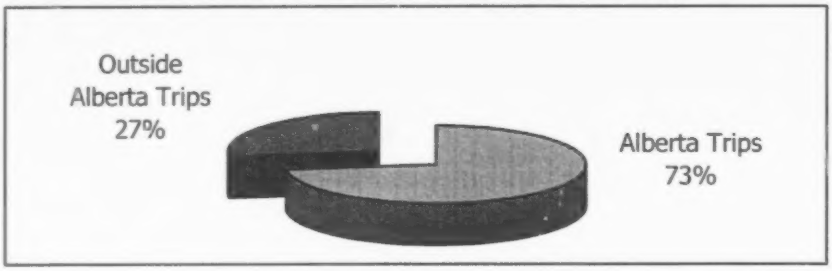
Figure 36
Q.3B How many of these trips will be outside of Alberta? Edmonton & Area Respondents (n=469)



Destinations

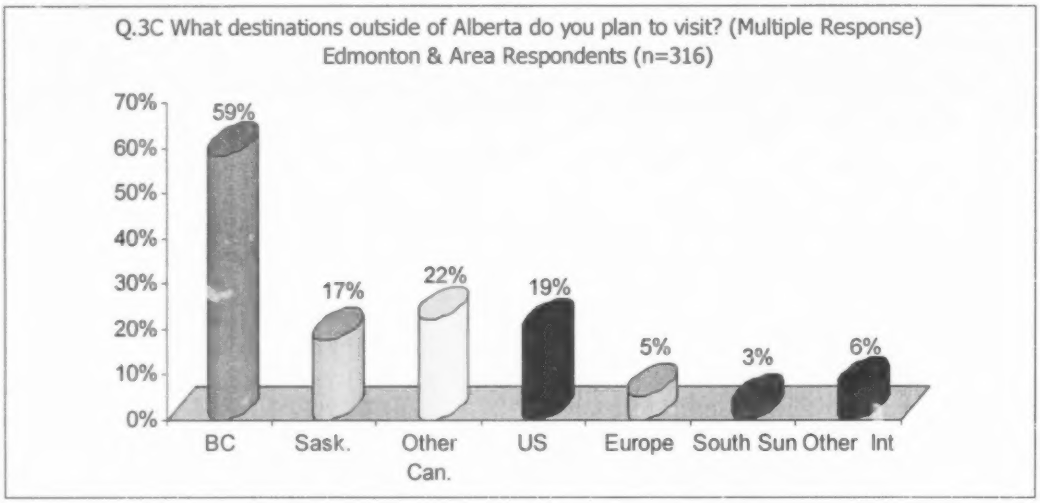
Overall, of the 1,746 trips planned by Edmonton & Area respondents, almost three-quarters of these trips are to destinations within Alberta (73%). The remaining 27% are planned for destinations outside of Alberta. (Figure 37 on the following page)

Figure 37 Percentage of Total Trips Planned by Destination
Edmonton & Area Respondents (N=1,746 Trips)



When asked about their intended destinations outside of Alberta, travel within Canada dominates, in particular, travel to British Columbia (59%). This is followed by trips to other areas of Canada (22%) and to Saskatchewan (17%). Outside of Canada, travel to the U.S.A was mentioned by 19% of Edmonton & Area respondents, and a much smaller 6% or less of respondents are planning trips to Europe (5%), Southern Sun destinations (3%) or other International areas (6%). (Figure 38 below)

Figure 38



Reasons for no travel within Alberta

More than forty percent (43%) of all Edmonton & Area respondents who are not planning any leisure trips within Alberta over the next six months indicated that they have *"no particular reason"* for not traveling in the province. Another 30% indicated they have *"no interest in*

Alberta, prefer destinations outside Alberta". 'Other' reasons given by those not planning travel within Alberta are detailed in Table 15 below.

Table 15

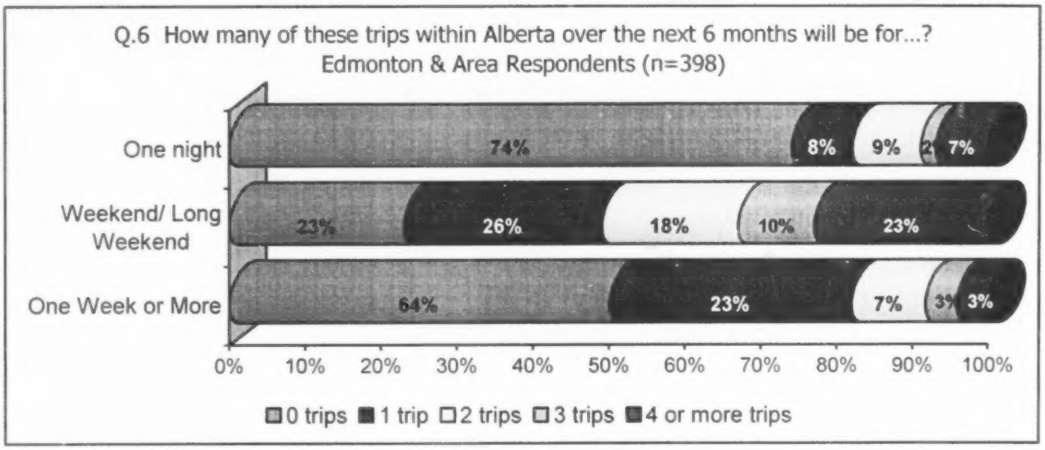
Q.4 Is there any particular reason why you do not intend to make any leisure trips in Alberta in the next 6 months (Multiple Response)	Edmonton & Area Respondents n=71
No particular reason	43.4%
No interest/prefer destinations outside Alberta	30.2%
Nothing new to do or see in Alberta	17.0%
No time – too busy	9.4%
No money – financial	5.7%
Need more info on things to do	5.7%
Other;	3.8%
• Relatives live outside Alberta	(1)
• Too crowded	(1)

In-Province Travelers (n=398)

Edmonton & Area in-province travelers indicated their 2003 travel intentions are either the same (60%) as in 2002, or have increased (24%) for 2003 (Q.5). Sixteen percent (16%) plan to travel less than they did in 2002.

More than three-quarters (77%) intend to take one or more weekend/long weekend trips over the next six months; one-third or less plan to take one or more overnight trips (26%), or trips of one week in length or longer (36%). (Figure 39 below)

Figure 39



Of the 1,276 Alberta trips planned by Edmonton & Area respondents, almost two-thirds (63%) will be weekend or long weekend trips. The remaining will be for one night only (24%) or for one week or longer (15%). (Figure 40 on the following page).

Alberta, prefer destinations outside Alberta". 'Other' reasons given by those not planning travel within Alberta are detailed in Table 15 below.

Table 15

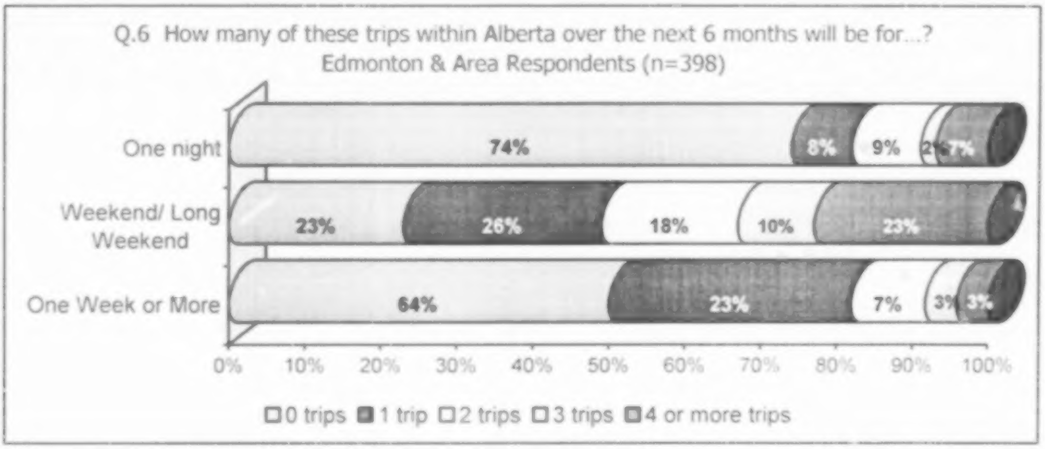
Q.4 Is there any particular reason why you do not intend to make any leisure trips in Alberta in the next 6 months (Multiple Response)	**Edmonton & Area Respondents n=71**
No particular reason	43.4%
No interest/prefer destinations outside Alberta	30.2%
Nothing new to do or see in Alberta	17.0%
No time – too busy	9.4%
No money – financial	5.7%
Need more info on things to do	5.7%
Other;	3.8%
• Relatives live outside Alberta	(1)
• Too crowded	(1)

In-Province Travelers (n=398)

Edmonton & Area in-province travelers indicated their 2003 travel intentions are either the same (60%) as in 2002, or have increased (24%) for 2003 (Q.5). Sixteen percent (16%) plan to travel less than they did in 2002.

More than three-quarters (77%) intend to take one or more weekend/long weekend trips over the next six months; one-third or less plan to take one or more overnight trips (26%), or trips of one week in length or longer (36%). (Figure 39 below)

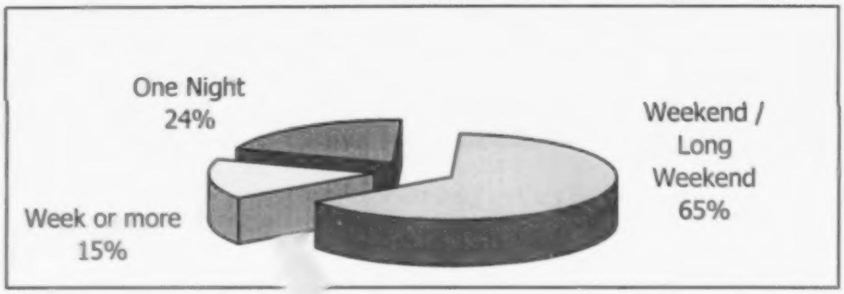
Figure 39



Q.6 How many of these trips within Alberta over the next 6 months will be for...?
Edmonton & Area Respondents (n=398)

Of the 1,276 Alberta trips planned by Edmonton & Area respondents, almost two-thirds (63%) will be weekend or long weekend trips. The remaining will be for one night only (24%) or for one week or longer (15%). (Figure 40 on the following page).

Figure 40 Percentage of Total Alberta Trips Planned by Trip Length
Edmonton & Area Respondents (N=1,276 Trips)



Travel Party Size and Planning Trips

Travel party size ranged between one to six persons, with the average travel group falling between two and three persons for both weekend and week or longer trips.

The range of days needed to plan weekend trips within Alberta falls between less than 1 day to a full year. Overall, for this group of respondents, the average number of days required to plan weekend trips (18.3 days) is less than half the time required to plan trips of one week or more within the province (42.0 days).

When the Regions were compared, it was found that Edmonton & Area respondents take more time to plan trips than respondents from Alberta South, the Canadian Rockies and Calgary & Area, but less than respondents from Alberta Central and Alberta North.

The most frequently reported time period for planning weekend trips is 7 days (25%), while the more typical time frame for planning trips of a week or longer is one month (28%). (Table 16 below).

Table 16

Q.7 How many members of your household will be traveling on... (Edmonton & Area Respondents)	Range	Mean (weighted)	Mode (weighted)	Not Applicable (weighted)*
A. Weekend trips (n=369)	1 to 6	2.59 persons	2 persons (40.4%)	n=29
B. Trips of one week or longer (n=322)	1 to 6	2.54 persons	2 persons (34.7%)	n=76
Q.8 How many days in advance do you typically plan leisure trips within Alberta for...	**Range**	**Mean (weighted)**	**Mode (weighted)**	**Not Applicable (weighted)***
A. Weekend trips (n=373)	0 to 365	18.3 days	7 days (24.6%)	n=25
B. Trips of one week or longer (n=346)	0 to 365	42.0 days	30 days (27.9%)	n=52

**These respondents indicated they do not typically take trips of this length when traveling in Alberta*

Specific In-Province Destinations

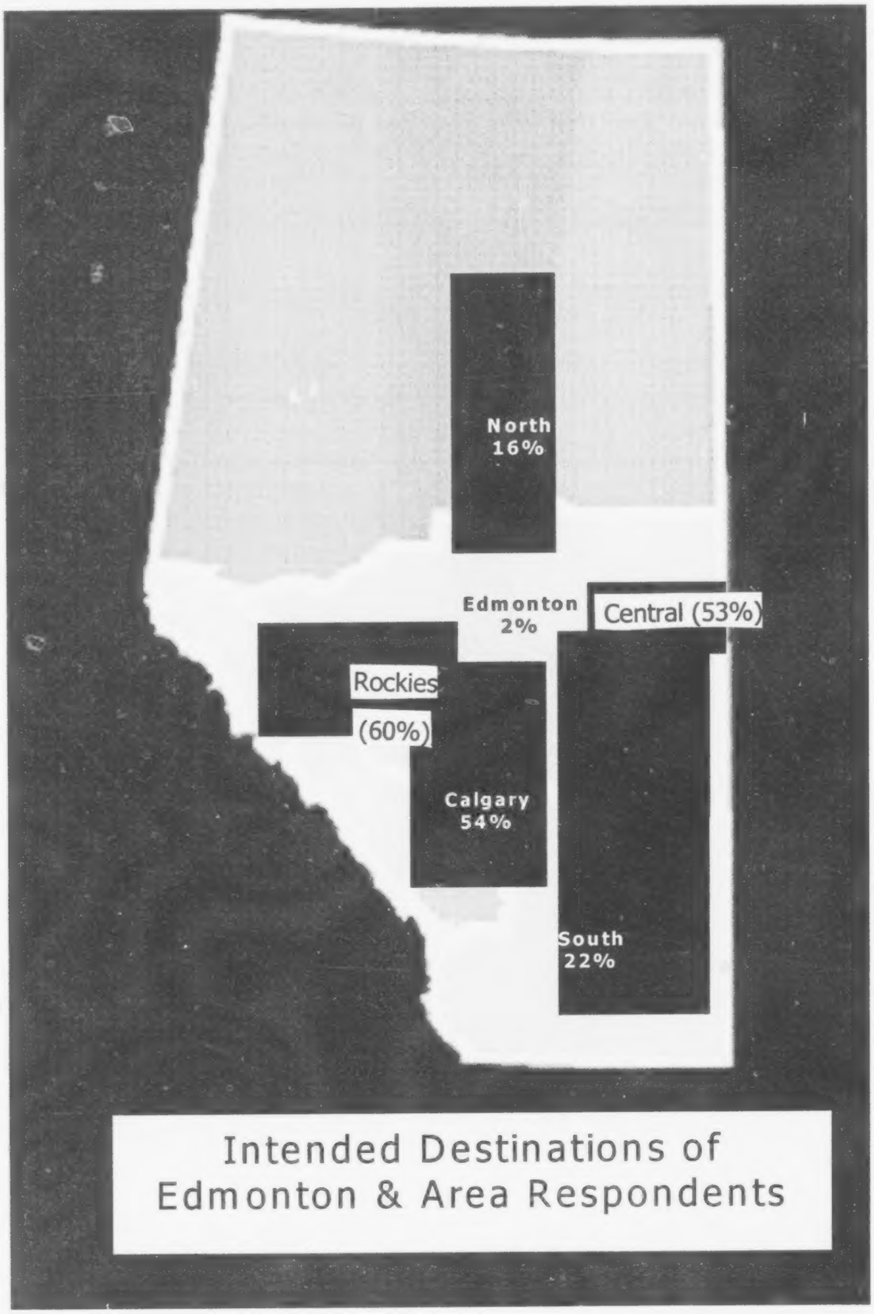
When respondents were asked about the destinations they plan to visit over the next six months, the most named destination was the Canadian Rockies region (60%), closely followed by travel to Calgary & Area (54%) and to Alberta Central (53%).

Over the next six months, just under one-quarter of Edmonton & Area respondents intend to travel to Alberta South (22%), while 16% plan to visit destinations in Alberta North. A small 2% are planning to travel within their own region (2%).

(A Flow Map depicting the planned travel from this Region is noted as Figure 41 on the following page)

Figure 41 – Flow Map of Edmonton & Area Respondents Intended Destinations*

**Please note that these results do not take into account the frequency of planned visits to each key destination*


North
16%
Edmonton
2%
Central (53%)
Rockies
(60%)
Calgary
54%
South
22%
Intended Destinations of
Edmonton & Area Respondents

Activities

Respondents were asked to indicate how likely they are to participate in a variety of activities while on leisure trips over the next six months. The most popular activity for Edmonton & Area respondents is *Visiting family and friends* (59% - very likely to participate in this activity); this results in a mean of 3.4 out of 4.

Three (3) of the remaining 16 activities were also indicated by the majority of these respondents as activities they would be *very likely* to participate in over the next six months. These activities include Outdoor Leisure (mean =3.1 out of 4), Outdoor Summer Sports (mean =3.0 out of 4) and Outdoor Recreation (mean=3.0 out of 4).

Eight (8) of the activity types are activities they are more likely to participate in than not, and reflect a mean ranging from 2.8 to 2.0. These include: Museums & Historical Sites (2.8 out of 4), Festivals & Cultural activities (2.7 out of 4), Indoor Leisure activities (2.6 out of 4), Calgary Stampede & Klondike Days (2.5 out of 4), Attractions (2.4 out of 4), Spectator sports & Entertainment (2.2 out of 4), Team Sports (2.1 out of 4) and Organized Sports Events (2.1 out of 4). Of all Regions, respondents in the Edmonton & Area Region are the most likely to participate in the broadest variety of activity.

Less popular activities, with the least likelihood for participation, include Outdoor Winter Sports (2.0 out of 4), Spas & other Health Club (2.0 out of 4), Aboriginal Attractions (1.9 out of 4), and Outdoor Adventure activities (1.7 out of 4). (See Table 17 below)

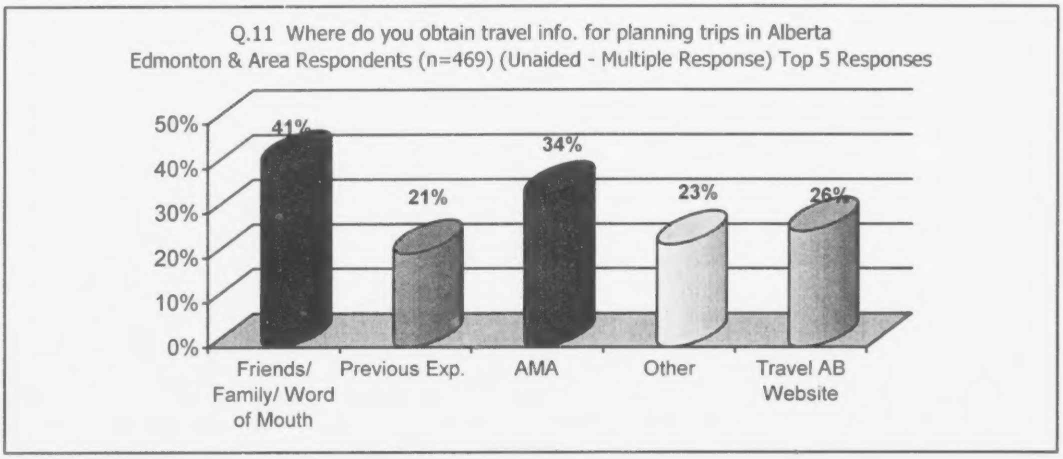
Table 17

Q.10 Activities Edmonton & Area Respondents (n=469)	Likelihood of Participating in...					Mean
	Very Unlikely	Somewhat Unlikely	Somewhat Likely	Very Likely	Don't Know	
Visit Friends & Relatives	7.1%	5.7%	27.7%	59.1%	0.3%	3.4
Outdoor Leisure	11.7%	6.9%	38.6%	42.6%	0.3%	3.1
Outdoor Summer Sports	15.7%	9.1%	27.1%	47.7%	0.3%	3.0
Outdoor Recreation	18.9%	6.9%	22.3%	51.7%	0.3%	3.0
Museums & Historical Sites	18.0%	16.6%	34.0%	31.1%	0.3%	2.8
Festivals & Cultural Activities	19.4%	18.0%	30.3%	32.0%	0.3%	2.7
Indoor Leisure Activities	24.9%	18.3%	29.4%	27.1%	0.3%	2.6
Calgary Stampede/ Klondike Days	30.0%	17.7%	26.9%	24.9%	0.6%	2.5
Attractions	28.3%	22.6%	25.4%	22.9%	0.9%	2.4
Spectator Sports & Entertainment	39.7%	14.9%	28.0%	16.9%	0.6%	2.2
Team Sports	38.6%	24.6%	19.4%	17.1%	0.3%	2.1
Organized Sports Events	40.3%	27.1%	17.7%	14.6%	0.3%	2.0
Outdoor Winter Sports	45.4%	22.6%	14.0%	17.7%	0.3%	2.0
Spas & Other Health Club	43.4%	25.1%	15.4%	15.7%	0.3%	2.0
Aboriginal Attractions	46.3%	29.1%	15.1%	8.9%	0.6%	1.9
Outdoor Adventure	57.4%	22.0%	13.1%	7.1%	0.3%	1.7

Information Sources

When Edmonton & Area respondents were asked about the information sources they rely on for planning trips in Alberta, the most frequently named source is *friends, family* or *word-of-mouth* (41%). A third of respondents rely on the AMA (34%), and around a quarter each rely on the Travel Alberta website (26%), and their previous experience (21%). Another twenty-three (23%) named a variety of other sources including; the Internet in general, books, maps, or travel agents. (Figure 42 below)

Figure 42



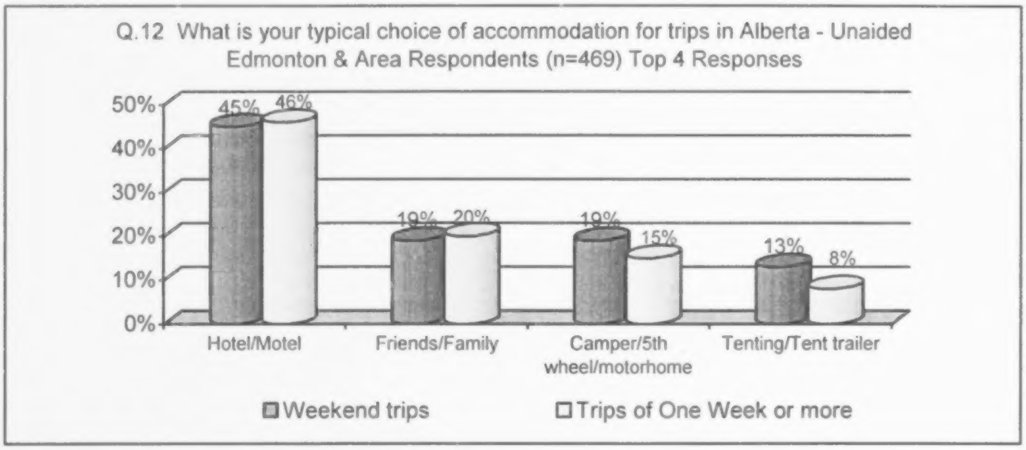
Accommodations

Few differences exist when it comes to typical choice of accommodations by Edmonton & Area respondents for either a weekend trip or trips of one week or longer.

- Forty-five percent (45%) to forty-six percent (46%) choose to stay in hotels/motels
- Nineteen and twenty percent (19% & 20%) would stay with friends or family
- Fifteen percent (15%) would use a Camper/5th wheel or Motorhome when on trips of one week or longer, with more choosing this type of accommodation for weekend trips (19%).
- Thirteen percent (13%) choose to tent or use a tent trailer on weekend trips, and eight percent (8%) on trips of one week or longer.

(See Figure 43 on the following page)

Figure 43



Advertising Recall

Respondents were asked if they could recall seeing, hearing or reading any advertising about travel in the previous two to three months. Less than forty percent (38%) indicated that they could recall such advertising. This is the second lowest level of recall of all regions next to Alberta South (22%). When asked about specific details of the advertising they recalled the response was limited.

The media source most frequent recall was television (22%), followed by newspapers (17%) and brochures (12%). Although to a much lesser degree, other sources named included various other magazines (8%), and the AMA magazine (8%). A very small 2% named billboards (2%).

Destinations they recall being advertised area coded into the six Tourism Destination Regions (TDR). The most frequent recall is for destinations in the Canadian Rockies (17%), followed by Calgary & Area destinations (8%), Alberta Central (6%) and Alberta South (5%). Destinations within the Edmonton & Area region and Alberta North destinations were recalled by three percent or less of respondents.

Few respondents were able to provide specific content of the advertising they could recall. The most frequent recall was about activities in general (10%), sight seeing (8%), or the Calgary Stampede (5%). Golf (3%), camping (3%), shopping (3%) and events in general (3%) were all mentioned by an even smaller number of respondents.

Travel Alberta was identified the most often (17%) as the sponsor of the advertising, followed by the AMA (9%), and the Calgary Stampede (2%). All other sponsors were mentioned by less than two percent.

(See Table 18 on the following Page)

Table 18

Q.13B Please describe the advertising...(Unaided - Multiple Response)
Edmonton & Area Respondents (n=177)
Top 6 responses per category

Media Source		Destinations		Activities		Sponsor	
TV	22.0%	Can. Rockies	16.7%	Activities in general	9.8%	Travel Alberta	16.7%
Newspaper	17.4%	Calgary & Area	8.3%	Sight-seeing	7.6%	AMA	9.1%
Brochures	12.1%	Alberta Central	6.1%	Calgary Stampede	5.3%	Calgary Stampede	2.3%
Other magazine	7.6%	Alberta South	4.5%	Golf	3.0%	Central AB Tourism	1.5%
AMA Magazine	7.6%	Edmonton & Area	3.0%	Shopping	3.0%	National Parks	0.8%
Billboards	2.3%	Alberta North	1.5%	Camping/Events In general	3.0%	Edmonton Tourism	0.8%
Do not recall	**33.4%**	**Do not recall**	**65.9%**	**Do not recall**	**62.9%**	**Do not recall**	**68.9%**

The *"Edmonton – Plan on Having Fun"* Campaign

Edmonton & Area respondents were not one of the target groups for the "Edmonton – Plan on having fun" campaign run from May 12, 2003 to May 18, 2003. However, of the 132 Edmonton & Area respondents who recalled any advertising over the previous two to three months, twelve percent (12%) said they recalled this specific campaign (21 respondents in total). Of those 21 respondents, 11 recalled seeing the campaign on television, eight (8) recalled it in the newspaper, three (3) said they saw it in a pamphlet, and one (1) recalled hearing the campaign on the radio.

Three (3) of the Edmonton & Area respondents (12.5%) who said they recalled the campaign indicated that it made an impact on their travel plans for the next 6 months.

Global Events

Fifteen percent (15%) of Edmonton & Area respondents reported their travel plans for the next six months had been impacted by recent global events. Of those, the most frequently named event was the SARS outbreak (63%), followed by the war in Iraq (43%) and the 9/11 events or terrorism in general (35%).

Fuels prices (15%), airlines restructuring (11%), the West Nile Virus (11%) and other global events (poor exchange rate, all of the above) (6%) were mentioned by fewer respondents.

When asked how these events had impacted their travel plans, more than a third indicated they *"are staying close to home, in Alberta"* (35%), and a quarter said they are *"not flying – only driving"* (24%). Seventeen percent (17%) of Edmonton & Area respondents indicated they are *"taking fewer trips overall"*, and 9% indicated they "are staying at home and in general not traveling as often.

Others from the Edmonton & Area region reported that global events have stopped them from traveling internationally to the USA and to Asia or the Middle East, or nationally to Toronto. Some have switched airlines or cancelled their travel plans all together.

Others mentioned that recent global events have resulted in them being more careful, but that these events are not enough of concern for them to change their travel plans. The West Nile virus has caused them to plan fewer outdoor activities. (Table 19 below)

Table 19 – Edmonton & Area Respondents (n=469)

Q.15A Have any global events made an impact on your travel plans for the next 6 months?			
Yes	15.4%	No	84.6%
Q.15B Which events in particular had an impact? (Aided - Multiple Response)? Edmonton & Area Respondents (n=54)		**Q.16 How has this/these event(s) impacted your travel plans for the next 6 months (Unaided - Multiple response) Edmonton & Area Respondents (n=54)**	
SARS	63.0%	Staying close to home – in AB	35.2%
War in Iraq	42.6%	Not flying – only driving	24.1%
9/11 Terrorism in general	35.2%	Taking fewer trips	16.7%
Fuel prices	14.8%	Staying at home – not traveling	9.3%
Airline restructuring	11.1%	Other	37.0%
West Nile Virus	11.1%	• Not traveling internationally	(5)
Other	5.6% (4)	• Not going to Toronto	(5)
• Poor Exchange rate	(3)	• Not traveling to Asia	(5)
• All of the above	(1)	• Delayed/cancelled plans	(4)
		• Not traveling to Middle East	(3)
		• Being careful but still traveling	(1)
		• Not traveling to US	(1)
		• Not going outside (West Nile)	(1)

Demographics

Q.17 Family Composition	
Single parent with children	5.7%
Single Adult Household	18.0%
2 Adults with Children	37.1%
2 Adults without Children	35.1%
3 or more Single Adults without children	2.9%
3 or more Single Adults with Children	0.6%
Refused	0.6%

Q.18 Age	
18 to 24 years	11.7%
25 to 34 years	14.9%
35 to 44 years	21.7%
45 to 54 years	23.1%
55 to 64 years	14.3%
65 or older	9.7%
Refused	4.6%

Q.19 Income	
Less than $25,000	8.0%
$25,000 to $49,999	23.7%
$50,000 to $99,999	38.0%
$100,000 and over	12.3%
Refused	18.0%

Q.20 Are you currently an AMA member?	
Yes	48.9%
No	50.3%
Don't Know	0.6%
Refused	0.3%

Q.21 Gender	
Male	44.9%
Female	55.1%

7.0 Alberta North Respondent Profile

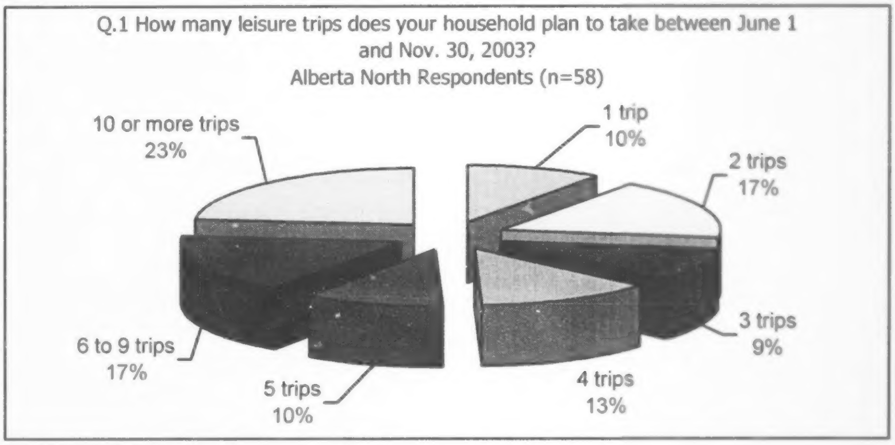
A total of 202 interviews were conducted with Alberta North respondents in May 2003. As the final data set has been weighted to better reflect the actual population distribution of the province of Alberta, these 202 interviews represent 58 interviews when weighting has been applied.

Intended Trips

The number of intended trips among Alberta North respondents over the next six months ranged from one (1) to 30 trips, with these respondents averaging 6.3 trips over the next 6 months. This mean is the highest of all TDR's.

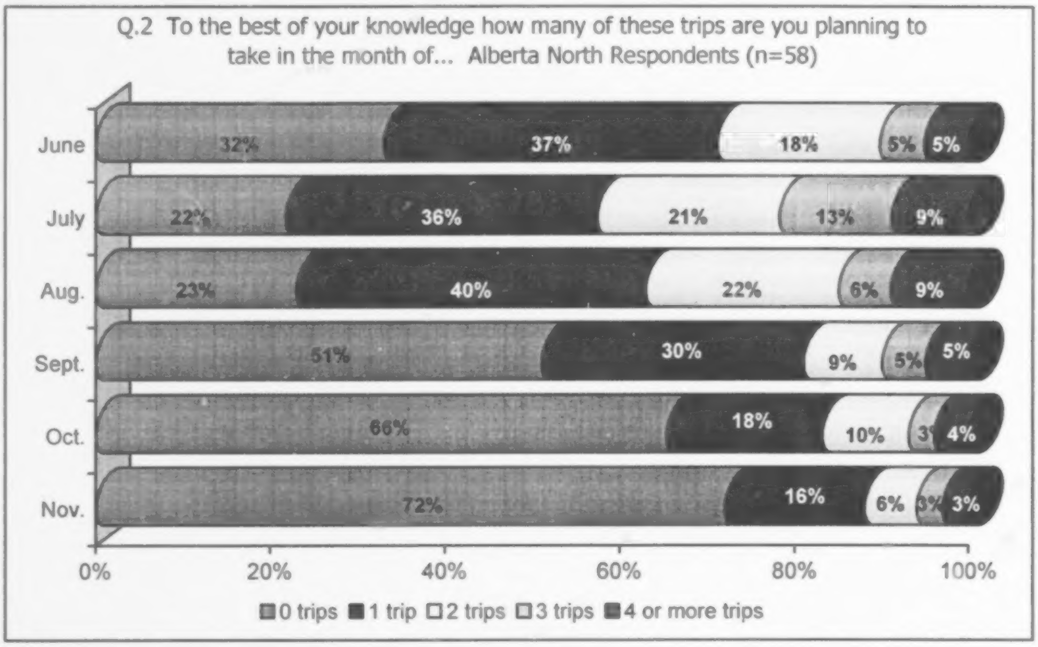
The number of respondents taking between one to five trips over the next six months is evenly distributed, with less than twenty percent of respondents planning to take one trip (10%), two trips (17%), three trips (9%), four trips (13%) or five trips (10%). Seventeen percent of respondents plan on taking between six and nine trips over the next six months, while the remaining 23% plan to take from ten to sixty trips over the next six months. (Figure 44)

Figure 44



When asked to indicate how many of these trips will be taken within specific months over the next six months, more than three-quarters of respondents said they are planning one or more trips in July (78%) and/or August (77%). Sixty-eight percent (68%) of respondents said they are planning one or more trips during June, while 49% plan to take one or more trips during September. A third of respondents plan to take one or more trips during October (34%), while 28% plan to take one or more trips during the month of November. (Figure 45 on the following page)

Figure 45



When looking at the specific months of travel for the 1,270 leisure trips planned by the Alberta North respondents over the next 6 months, the highest number of trips are planned for the months of July (25%) and August (23%). Twenty percent (20%) are planned for the month of June, and 13% for September. Fewer trips are planned for the months of October (9%) and November (8%). (See Figure 46 below)

Figure 46

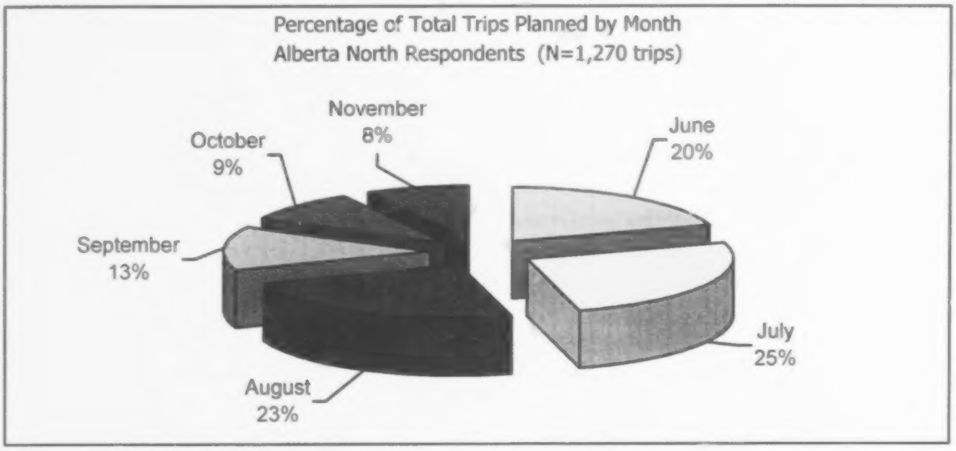
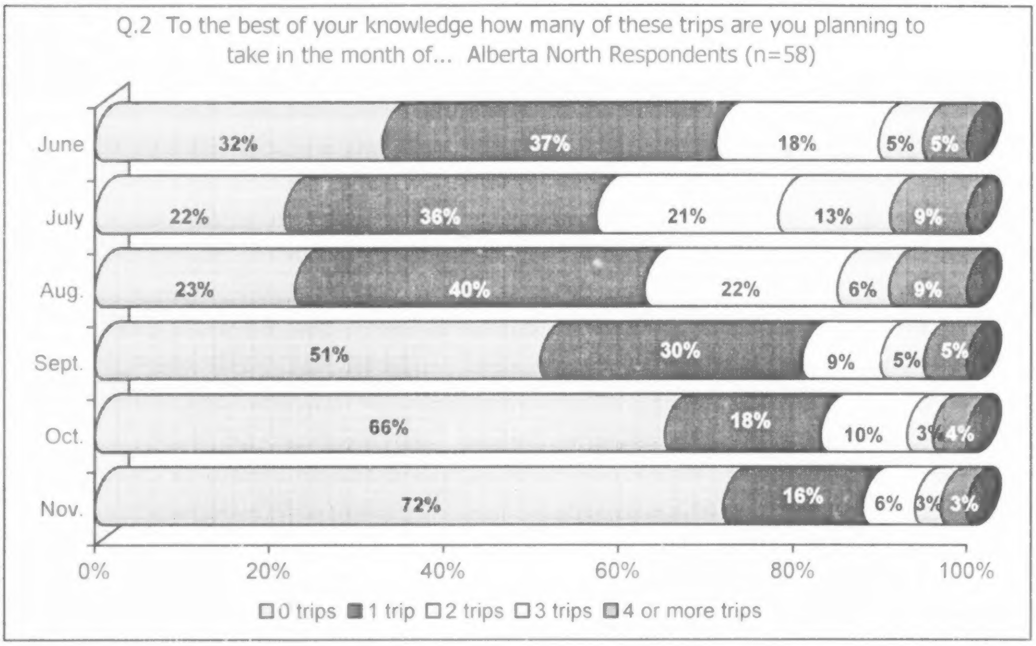
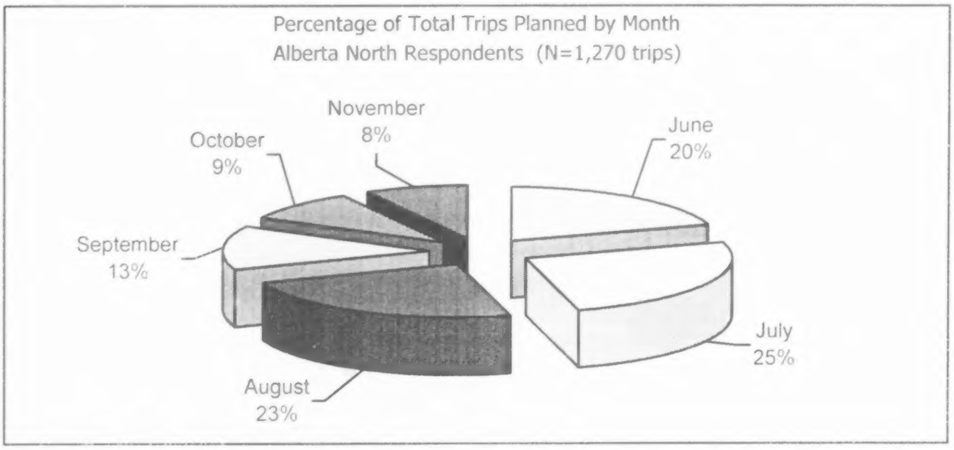


Figure 45



When looking at the specific months of travel for the 1,270 leisure trips planned by the Alberta North respondents over the next 6 months, the highest number of trips are planned for the months of July (25%) and August (23%). Twenty percent (20%) are planned for the month of June, and 13% for September. Fewer trips are planned for the months of October (9%) and November (8%). (See Figure 46 below)

Figure 46



Respondents were asked to distinguish between their in-province trips and trips outside of Alberta:

In-Province Travel (See Figure 47 below)

- The majority (90%) intend to take at least one leisure trip within Alberta.
- Forty percent (40%) plan on making three or less trips within Alberta.
- Half (50%) plan on making four or more trips within Alberta.

Of all Regions, Alberta North respondents are the most likely respondents to travel within Alberta, and have the highest proportion of respondents planning four or more trips within the province (50%) over the next six months. This region also has the highest intentions of all regions for taking at least one leisure trip over the next six months.

Outside Alberta (See Figure 48 below)
When asked about their plans to travel outside of Alberta, 43% of Alberta North respondents do not intend to take leisure trips outside the province over the next six months. Of the 57% who do intend to travel outside of Alberta:

- 34% are planning one trip
- 11% are planning 2 trips
- 7% are planning 3 trips
- The remaining five (5%) intend to take either five (3%) or ten trips (0.5%)

Figure 47
Q.3A How many of these trips will be within Alberta? Alberta North Respondents (n=58)

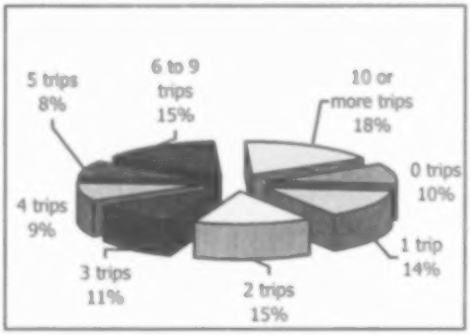
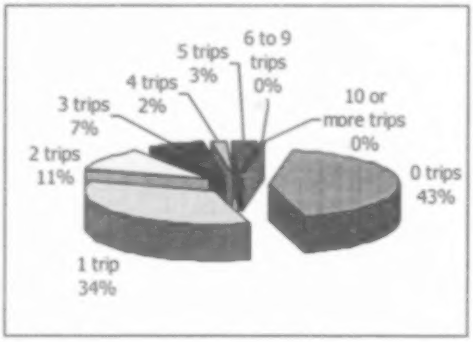


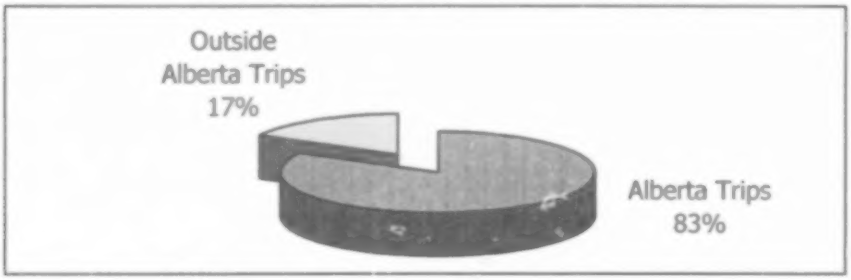
Figure 48
Q.3B How many of these trips will be outside of Alberta? Alberta North Respondents (n=58)



Destinations

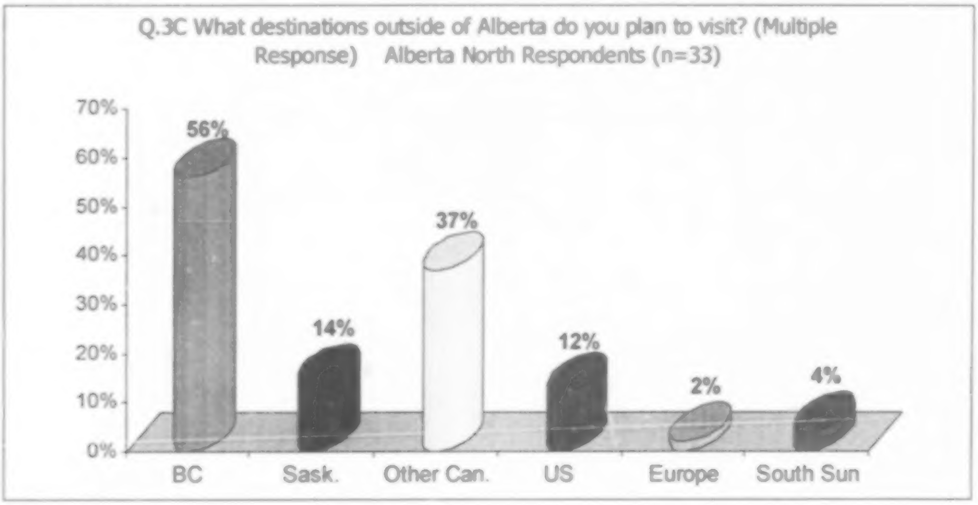
Of the 1,270 trips planned by the Alberta North respondents, a high 83% of these trips will b made to destinations within Alberta. (Figure 49 below)

Figure 49 Percentage of Total Trips Planned by Destination
Alberta North Respondents (N=1,270 trips)



When asked about intended destinations outside of Alberta, travel within Canada dominates, in particular travel to British Columbia (56%). This is followed by travel to other areas of Canada (37%) and to Saskatchewan (14%). Outside of Canada, travel to the U.S.A. was named by 12% of Alberta North respondents, and much smaller numbers are planning trips to other Southern Sun destinations (4%) or Europe (2%). (See Figure 50 below)

Figure 50



Reasons for no travel within Alberta
More than forty percent (45%) of all Alberta North respondents who are not planning any leisure trips within Alberta over the next six months indicated they have *"no particular reason"* for not traveling within the province. Another 25% said they have *"no interest in Alberta, prefer destinations outside Alberta"*. Other reasons given by those not planning travel in Alberta are detailed in Table 20 on the following page.

Table 20

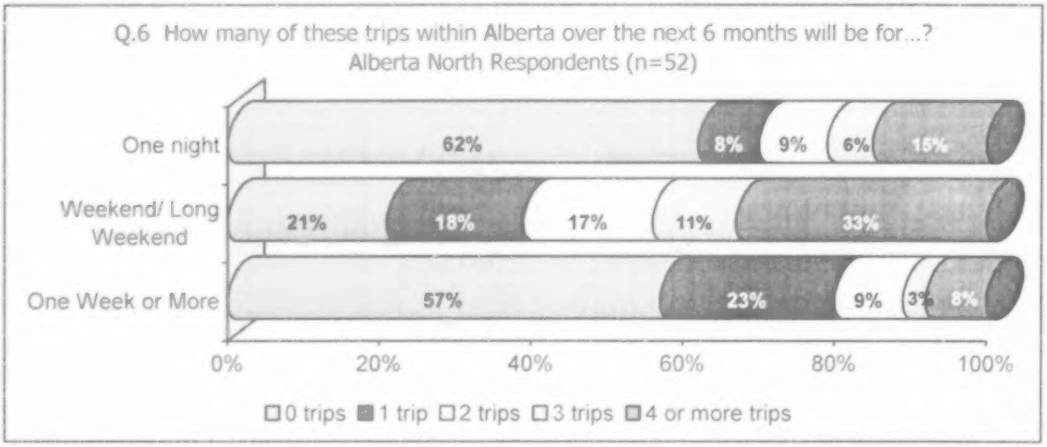
Q.4 Is there any particular reason why you do not intend to make any leisure trips in Alberta in the next 6 months (Multiple Response)	Alberta North Respondents n=6
No particular reason	45.0%
No interest/prefer destinations outside Alberta	25.0%
No time – too busy	10.0%
No money – financial	5.0%
Other; • Relatives live outside Alberta	20.0% (1) (1)

In-Province Travelers (n=52)

Alberta North in-province travelers indicated their 2003 travel intentions are either the same (59%) as in 2002, or have increased (29%) for 2003 (Q.5). Twelve percent (12%) plan to travel less during 2003 than they did in 2002.

More than three-quarters (79%) intend to take one or more weekend/long weekend trips over the next six months, more than a third plan to take one or more overnight trips (38%), or trips of one week in length or longer (43%). (Figure 51 below)

Figure 51



Of the 1,060 Alberta trips planned by Alberta North respondents, over half (54%) will be weekend or long weekend trips. The remaining trips planned within Alberta will be for one night only (28%), or for one week or longer (17%). (See Figure 52 on following page)

Table 20

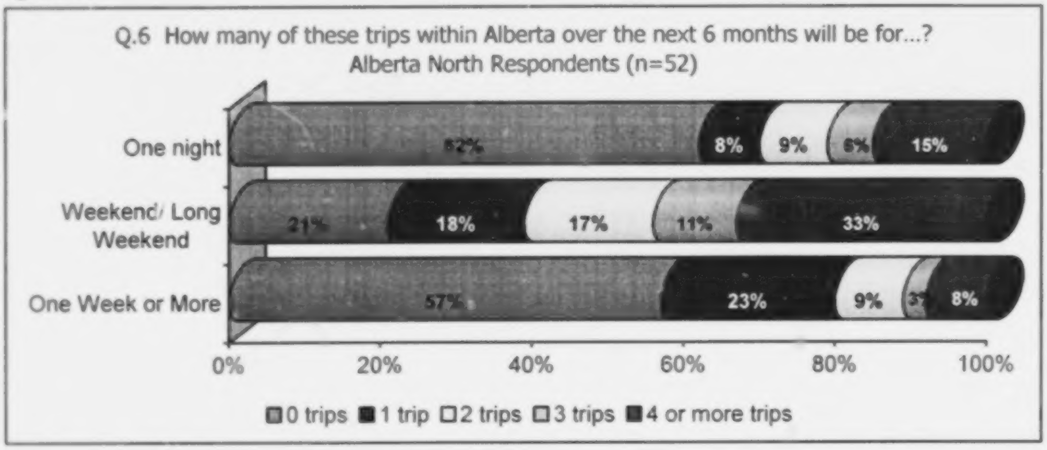
Q.4 Is there any particular reason why you do not intend to make any leisure trips in Alberta in the next 6 months (Multiple Response)	**Alberta North Respondents n=6**
No particular reason	45.0%
No interest/prefer destinations outside Alberta	25.0%
No time – too busy	10.0%
No money – financial	5.0%
Other; - Relatives live outside Alberta	20.0% (1) (1)

In-Province Travelers (n=52)

Alberta North in-province travelers indicated their 2003 travel intentions are either the same (59%) as in 2002, or have increased (29%) for 2003 (Q.5). Twelve percent (12%) plan to travel less during 2003 than they did in 2002.

More than three-quarters (79%) intend to take one or more weekend/long weekend trips over the next six months, more than a third plan to take one or more overnight trips (38%), or trips of one week in length or longer (43%). (Figure 51 below)

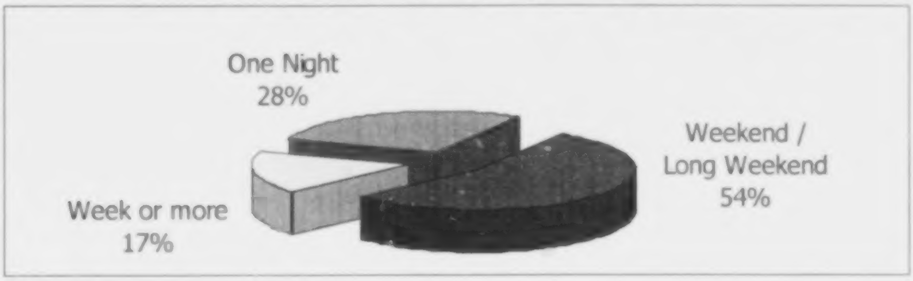
Figure 51



Q.6 How many of these trips within Alberta over the next 6 months will be for...?
Alberta North Respondents (n=52)

Of the 1,060 Alberta trips planned by Alberta North respondents, over half (54%) will be weekend or long weekend trips. The remaining trips planned within Alberta will be for one night only (28%), or for one week or longer (17%). (See Figure 52 on following page)

Figure 52 Percentage of Total Alberta Trips Planned by Trip Length
Alberta North Respondents (N=1,060 trips)



Travel Party Size and Planning Trips

Travel party size for both weekend and week or longer trips over the next six months is expected to range between one to seven persons, with the average travel group falling between two and three persons.

The range of days needed to plan weekend trips within Alberta falls between less than 1 day to up to four months, and 1 day to eight months for week or longer trips. The average number of days required to plan weekend trips is 16.5 days, which is less than one-third of the time spent to plan trips of one week or more within the province (51.3 days). Overall, Alberta North respondents plan the farthest in advance of all regions for trips of one week or longer.

The most frequently reported time period required for planning weekend trips by Alberta North respondents is 7 days (31%), and the more typical time frame for planning trips of a week or longer is one month (23%). (Table 21 below)

Table 21

Q.7 How many members of your household will be traveling on... (Alberta North Respondents)	Range	Mean (weighted)	Mode (weighted)	Not Applicable (weighted)*
A. Weekend trips (n=52)	**1 to 7**	**2.77 persons**	**2 persons (37.4%)**	**n=0**
B. Trips of one week or longer (n=45)	**1 to 7**	**2.68 persons**	**2 persons (29.7%)**	**n=7**
Q.8 How many days in advance do you typically plan leisure trips within Alberta for...	**Range**	**Mean (weighted)**	**Mode (weighted)**	**Not Applicable (weighted)***
A. Weekend trips (n=51)	**0 to 120**	**16.5 days**	**7 days (30.8%)**	**n=1**
B. Trips of one week or longer (n=46)	**0 to 240**	**51.3 days**	**30 days (23.1%)**	**n=6**

**These respondents indicated they do not typically take trips of this length when traveling in Alberta*

Specific Destinations within the Province

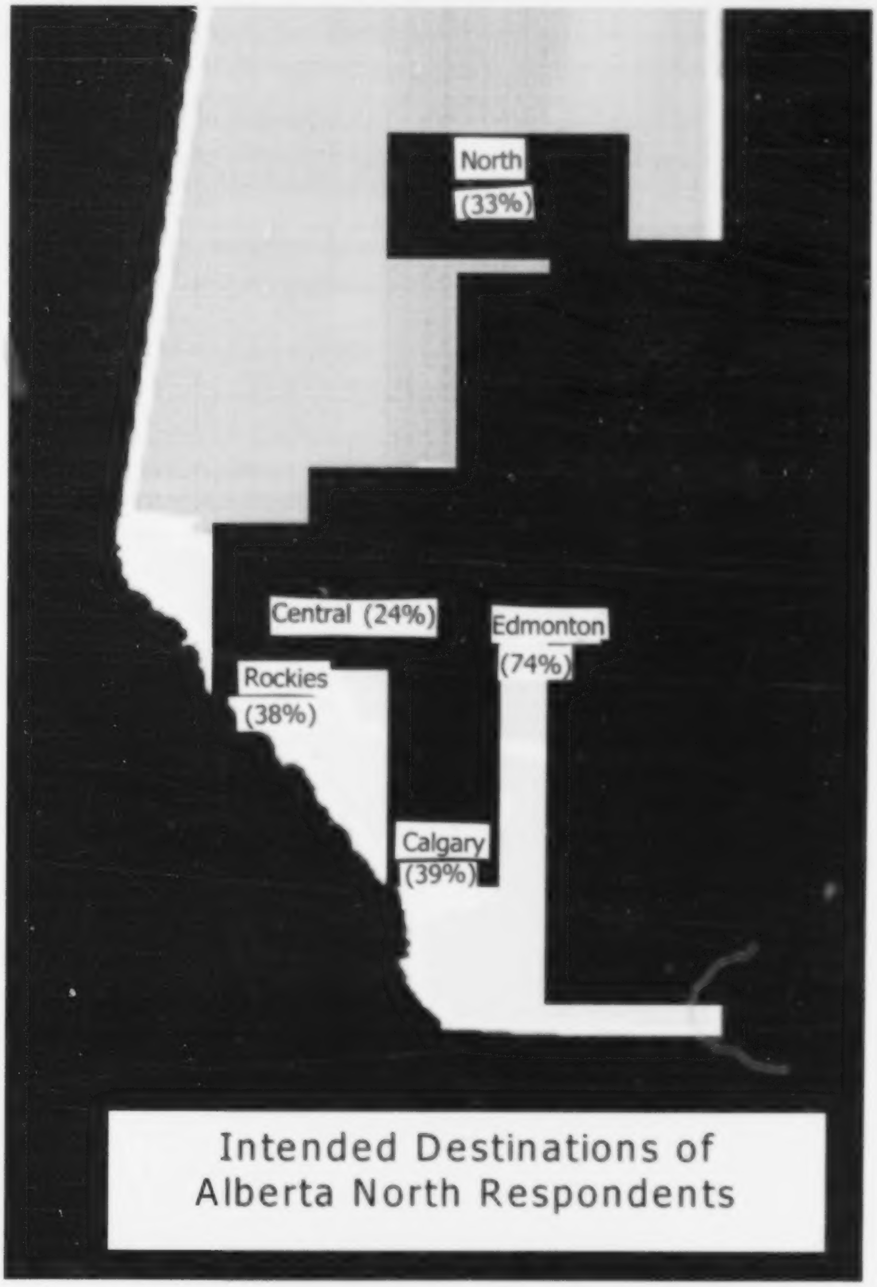
When respondents were asked about the destinations they plan to visit over the next six months, the most named destinations are Edmonton & Area region (74%), distantly followed by travel to Calgary & Area (39%), and the Canadian Rockies (38%).

Over the next six months, a third of Alberta North respondents intend to travel to destinations within their own region (33%), a quarter is planning trips to Alberta Central (24%), and a smaller 15% of respondents intend to travel to the Alberta South region.

(A Flow Map depicting the planned travel from this Region is noted as Figure 53 on the following page)

Figure 53 – Flow Map of Alberta North Respondents Intended Destinations*

**Please note that these results do not take into account the frequency of planned visits to each key destination*


North
(33%)
Central (24%)
Edmonton
(74%)
Rockies
(38%)
Calgary
(39%)
Intended Destinations of
Alberta North Respondents

Activities

Alberta North respondents were asked to indicate how likely they are to participate in a variety of activities while on leisure trips in Alberta over the next six months. The most popular activity for Alberta North respondents is *Visiting family and friends*, (84% - very likely to participate in this activity); this results in a mean of 3.7 out of 4.

Four (4) of the remaining 16 activities were also indicated by the majority of Alberta North respondents as activities they would be very likely to participate in over the next six months. These activities include Outdoor Summer Sports (mean=3.2 out of 4), Outdoor Leisure (mean=3.2 out of 4), Outdoor Recreation (mean= 3.2 out of 4) and Indoor leisure activities (mean=3.2 out of 4).

Three (3) of the activity types they are more likely to participate in than not, and reflect a mean ranging from 2.3 to 2.8. These activities include: Attractions (2.8 out of 4), Museums & Historical Sites (2.5 out of 4) and Festivals & Cultural activities (2.3 out of 4).

Less popular activities, with the least likelihood for participation include the remaining eight (8) activities. (See Table 22 below)

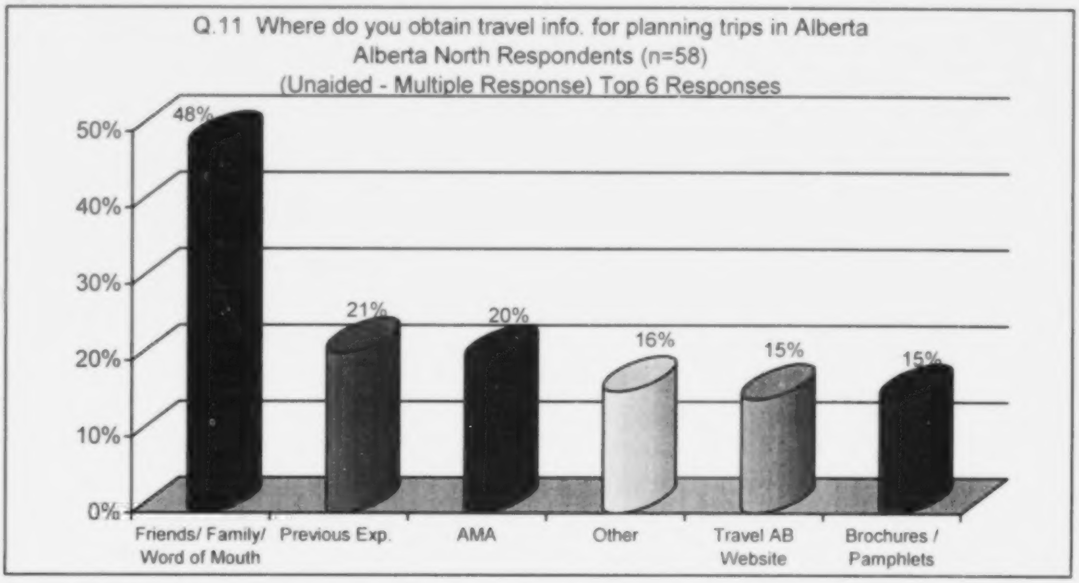
Table 22

Q.10 Activities Alberta North Respondents (n=58)	Likelihood of Participating in...					
	Very Unlikely	Somewhat Unlikely	Somewhat Likely	Very Likely	Don't Know	Mean
Visit Friends & Relatives	6.4%	0.5%	8.9%	84.2%	0	3.7
Outdoor Summer Sports	15.3%	4.5%	19.8%	60.4%	0	3.2
Outdoor Leisure	13.4%	5.0%	27.7%	54.0%	0	3.2
Outdoor Recreation	19.8%	1.5%	17.8%	60.9%	0	3.2
Indoor Leisure Activities	15.8%	5.0%	22.8%	56.4%	0	3.2
Attractions	28.2%	7.9%	23.8%	40.1%	0	2.8
Museums & Historical Sites	33.7%	13.4%	19.8%	33.2%	0	2.5
Festivals & Cultural Activities	39.1%	9.9%	29.7%	21.3%	0	2.3
Team Sports	57.4%	7.4%	14.4%	20.8%	0	2.0
Organized Sports Events	57.9%	7.9%	12.9%	20.3%	1.0%	2.0
Calgary Stampede/ Klondike Days	58.4%	8.4%	13.4%	19.8%	0	1.9
Outdoor Winter Sports	58.9%	7.9%	12.9%	20.3%	0	1.9
Spectator Sports & Entertainment	60.9%	7.4%	13.9%	17.8%	0	1.9
Spas & Other Health Club	65.8%	10.4%	10.9%	12.9%	0	1.7
Aboriginal Attractions	65.8%	10.4%	14.9%	8.9%	0	1.7
Outdoor Adventure	68.8%	7.4%	12.4%	11.4%	0	1.7

Information Sources

When Alberta North respondents were asked about the information sources they rely on for planning trips within Alberta, the most frequently mentioned source is *friends, family* or *word-of-mouth* (48%). Twenty percent or more of respondents rely on their previous experience (21%) or the AMA (20%), and 15% rely on brochures and pamphlets or the Travel Alberta website. Another 16% named a variety of other sources including, the Internet in general, books, maps, or travel agents. (Figure 54 below)

Figure 54



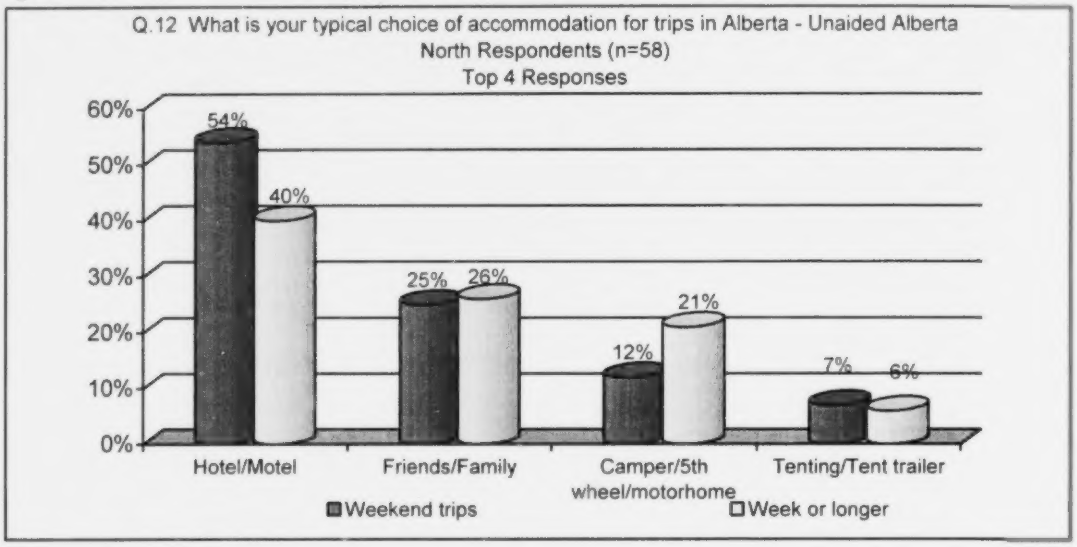
Accommodations

Differences do exist when it comes to a typical choice of accommodations for either a weekend trip or trips of one week or longer:

- Fifty-four percent (54%) choose to stay in hotels/motels while on weekend trips.
- Forty percent (40%) choose to stay hotel/motels for trips of one week or longer.
- One-quarter (25%) choose to stay with friends or family, regardless of the length of trip.
- Twenty-one percent (21%) choose a Camper/5th wheel or Motorhome on trips of one week or longer, with considerably fewer choosing this for weekend trips (12%).
- A small 7% choose a tent or use a tent trailer on weekend trips, while only six percent (6%) will choose this for trips of one week or longer.

(See Figure 55 on the following page)

Figure 55



Advertising Recall

Respondents were asked if they could recall seeing, hearing or reading any advertising about travel in the previous two to three months. Close to sixty percent (59%) indicated they could recall such advertising, which is the highest recall of all regions. However, when asked about the specific details of this advertising response were limited.

The media source with the most recall was brochures (18%), television (15%) and newspapers (12%). Although to a much lesser degree, 'other source' included the AMA magazine (5%), other magazines (4%) and radio (2%).

Destinations they recall being advertised are coded into the six Tourism Destination Regions (TDR). The most frequent recall is for destinations located in Edmonton & Area (19%) followed by the Canadian Rockies (13%), Alberta South (8%) and Alberta North (8%). Destinations within the Calgary & Area region (7%) or Alberta Central (2%) region had the least recall.

Only a few respondents were able to provide specific details of the content of the advertising. The most frequent recall was for events in general (8%), the Calgary Stampede (5%), activities in general (4%), sight seeing (4%), or camping (3%). Three percent (3%) of respondents recalled advertising for each of golf, museums and fishing.

Travel Alberta was identified the most often (8%) as the sponsor of the advertising, followed by the AMA (5%). No other sponsors were mentioned. (See Table 23 on the following page)

Table 23

Q.13B Please describe the advertising...(Unaided - Multiple Response)
Alberta North Respondents (n=34)
Top 6 responses per category

Media Source		Destinations		Activities		Sponsor	
Brochures	17.5%	Edmonton & Area	19.2%	Events in general	7.5%	Travel Alberta	8.3%
TV	15.0%	Can. Rockies	13.3%	Calgary Stampede	5.0%	AMA	5.0%
Newspaper	11.7%	Alberta South	8.3%	Activities in general	4.2%		
AMA Magazine	5.0%	Alberta North	8.3%	Sight-seeing	4.2%		
Other Magazine	4.2%	Calgary & Area	6.7%	Camping	3.3%		
Radio	4.2%	Alberta Central	1.7%	Golf/ Museums/ Fishing	2.5%		
Do not recall	**41.7%**	**Do not recall**	**50.8%**	**Do not recall**	**68.3%**	**Do not recall**	**86.7%**

The *"Edmonton – Plan on Having Fun"* Campaign

Alberta North respondents were one of the target groups for the "Edmonton – Plan on having fun" campaign run from May 12, 2003 to May 18, 2003. Of the 34 Alberta North respondents who recalled any advertising during the previous two to three months, sixteen percent (16%) recalled this particular campaign (5 respondents in total). Of these five respondents, two (2) recalled the campaign from a pamphlet and one (1) respondent each recalled the campaign from TV, the newspaper or glossy magazines.

Two (2) of the Alberta North respondents who recalled the campaign indicated that the campaign impacted their travel plans for the next 6 months.

Global Events

Sixteen percent (16%) of Alberta North respondents reported their travel plans for the next six months had been impacted by recent global events. Of those, the most frequently named event was the 9/11 events or terrorism in general (63%), the SARS outbreak (59%), followed by the war in Iraq (38%).

Fuels prices (13%), airline restructuring (9%) or the West Nile Virus (6%) were mentioned by fewer Alberta North respondents.

When asked how these events had impacted their travel plans, over a third indicated they *"are staying close to home, in Alberta"* (40%) or that they were "*not flying – only driving*" (38%). Thirteen percent (13%) of Alberta North respondents indicated they are "*taking fewer trips*".

Others from the Alberta North region reported that global events have stopped them from traveling internationally to the USA, and nationally to Toronto. Some cancelled their travel plans all together. (Table 24 on following page)

Table 24 – Alberta North Respondents (n=58)

Q.15A Have any global events made an impact on your travel plans for the next 6 months?			
Yes	15.8%	No	84.2%
Q.15B Which events in particular had an impact? (Aided - Multiple Response) Alberta North Respondents (n=9)		**Q.16 How has this/these event(s) impacted your travel plans for the next 6 months (Unaided - Multiple response) Alberta North Respondents (n=9)**	
9/11 Terrorism in general	62.5%	Staying close to home – in AB	40.6%
SARS	59.4%	Not flying – only driving	37.5%
War in Iraq	37.5%	Taking fewer trips	12.5%
Fuel Prices	12.5%	Other;	31.2%
Airline restructuring	9.4%	• Not traveling internationally	(1)
West Nile Virus	6.2%	• Not going to Toronto	(1)
		• Delayed/cancelled plans	(1)
		• Not traveling to US	(1)
		• Traveling more – less cost	(1)

Demographics

Q.17 Family Composition		**Q.18 Age**	
Single parent with children	4.5%	18 to 24 years	10.4%
Single Adult Household	9.4%	25 to 34 years	23.3%
2 Adults with Children	50.5%	35 to 44 years	27.2%
2 Adults without Children	33.2%	45 to 54 years	23.8%
3 or more Single Adults without children	1.5%	55 to 64 years	8.4%
3 or more Single Adults with Children	1.0%	65 or older	4.5%
Refused	0	Refused	2.5%
Q.19 Income		**Q.20 Are you currently an AMA member?**	
Less than $25,000	5.9%	Yes	41.1%
$25,000 to $49,999	20.8%	No	58.4%
$50,000 to $99,999	33.7%	Don't Know	0.5%
$100,000 and over	28.2%	Refused	0
Refused	11.4%		
Q.21 Gender			
Male	38.1%		
Female	61.9%		

8.0 Alberta Central Respondent Profile

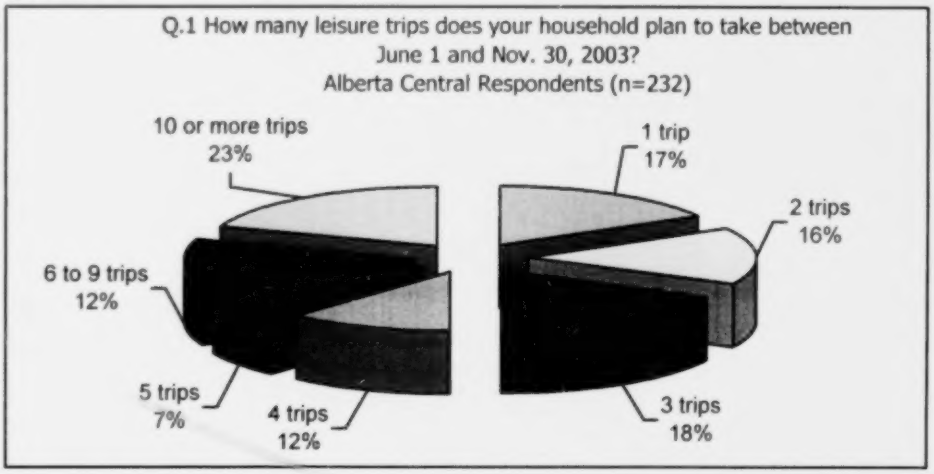
A total of 200 interviews were conducted with Alberta Central respondents in May 2003. As the final data set has been weighted to better reflect the actual population distribution of the province of Alberta, these 200 interviews represent 232 interviews when weighting has been applied.

Intended Trips

The number of planned trips among Alberta Central respondents ranged from one (1) to 31 trips, with these respondents averaging 5.9 trips over the next 6 months.

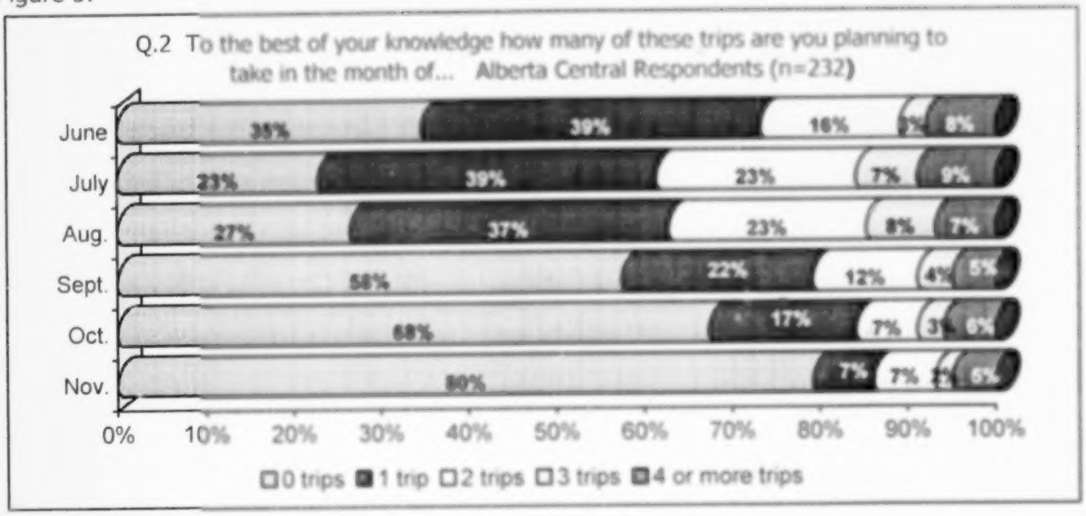
The number of respondents taking between one to five trips is evenly distributed with less than twenty percent of respondents planning to take one trip (17%), two trips (16%), three trips (18%), four trips (12%) or five trips (17%). Twelve percent of respondents plan to take between six and nine trips over the next six months, while the remaining 23% plan to take anywhere from ten to thirty-one trips. (Figure 56 below)

Figure 56



When asked to indicate how many of these trips will be taken within specific months, around three-quarters of Alberta Central respondents said they plan to take one or more trips during July (77%) and/or in August (73%). Sixty-five percent of respondents plan to take one or more trips during June (65%), and 42% plan to take one or more trips in September. Another third (32%) plan to take one or more trips during October, while a smaller 20% plan to take one or more trips during November. (See Figure 57 on the following page)

Figure 57



When looking at the specific months of travel for the 1,171 trips planned by Alberta Central respondents over the next 6 months, the highest number of trips are planned for the months of July (25%) and August (23%). Nineteen percent (19%) of these trips are planned for June, and a smaller 15% are planned for September (13%). Fewer trips are planned for October (11%) and November (8%). (Figure 58 below)

Figure 58

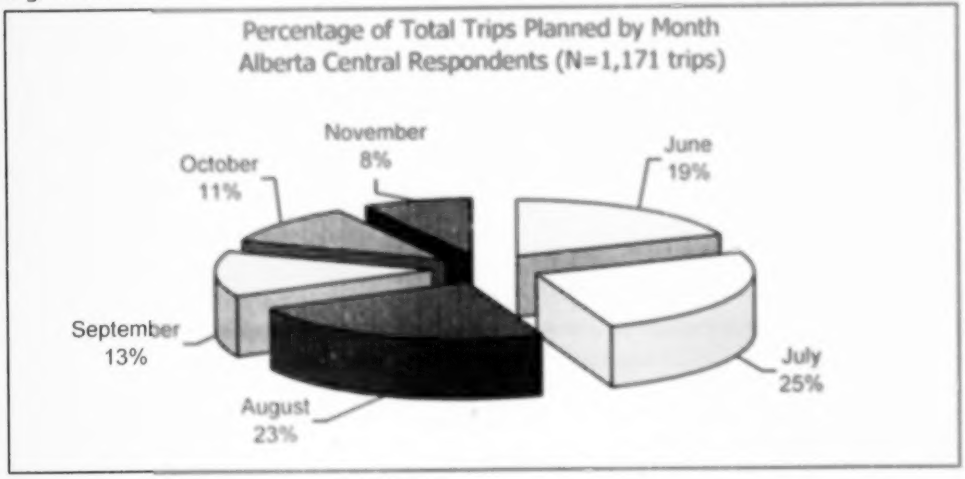
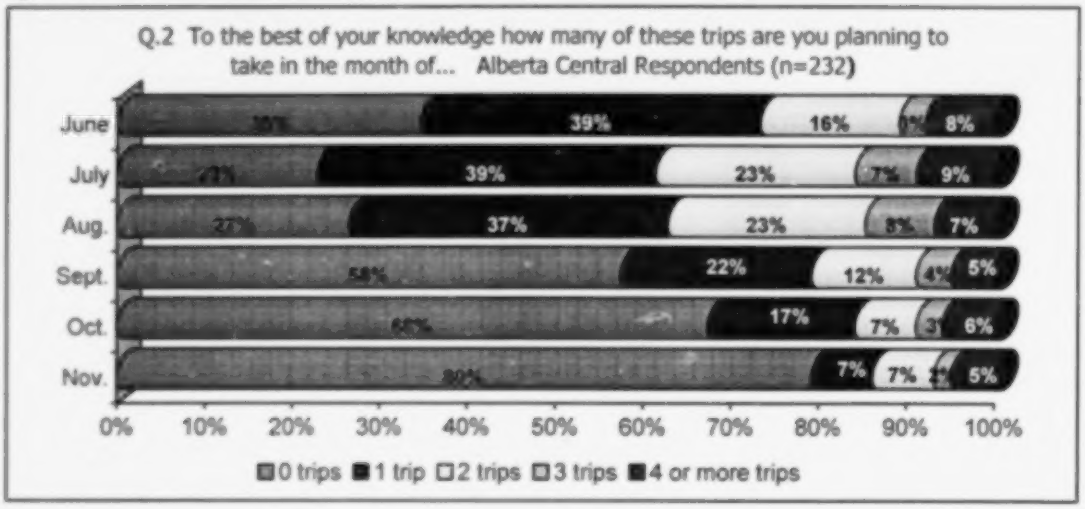
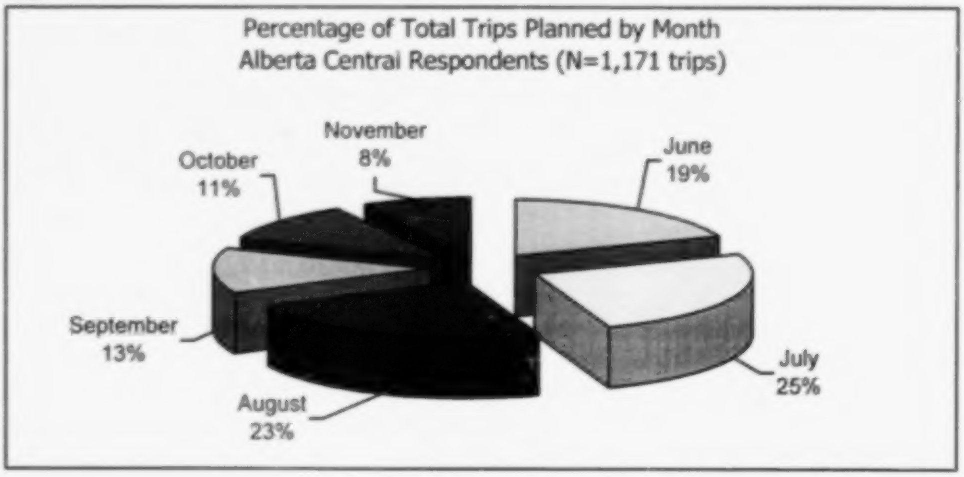


Figure 57


Q.2 To the best of your knowledge how many of these trips are you planning to take in the month of... Alberta Central Respondents (n=232)

When looking at the specific months of travel for the 1,171 trips planned by Alberta Central respondents over the next 6 months, the highest number of trips are planned for the months of July (25%) and August (23%). Nineteen percent (19%) of these trips are planned for June, and a smaller 15% are planned for September (13%). Fewer trips are planned for October (11%) and November (8%). (Figure 58 below)

Figure 58


Percentage of Total Trips Planned by Month
Alberta Central Respondents (N=1,171 trips)

Respondents were asked to distinguish between their in-province trips and trips outside of Alberta: (See Figure 59 and Figure 60 below)

In-Province Travel (Figure 59)

- The majority (86%) intend to take at least one leisure trip within Alberta over the next 6 months.
- Forty-eight percent (48%) plan on taking three or less trips over the next six months
- Over a third (38%) plan on taking four or more trips within Alberta over the next 6 months.
- Next to Alberta North, Alberta Central respondents are the second highest to say they will take at least one leisure trip within Alberta over the next 6 months.

Outside Alberta (Figure 60)

When asked about their plans to travel outside of Alberta, 45% of Alberta Central respondents do not intend to leave Alberta for leisure trips over the next six months. Of the 55% who do intend to travel outside of Alberta for leisure:

- 32% are planning one trip
- 13% are planning 2 trips
- 5% are planning 3 trips
- The remaining 6% intend to take between five (5) and 22 trips outside of the province over the next six months

Of all Regions, Alberta Central respondents are the least likely to say they will be taking trips outside the Province over the next 6 months.

Figure 59

Q.3A How many of these trips will be within Alberta? Alberta Central Respondents (n=232)

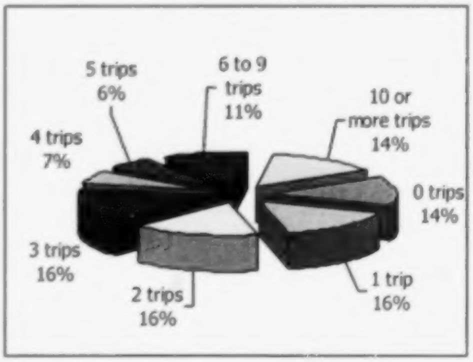
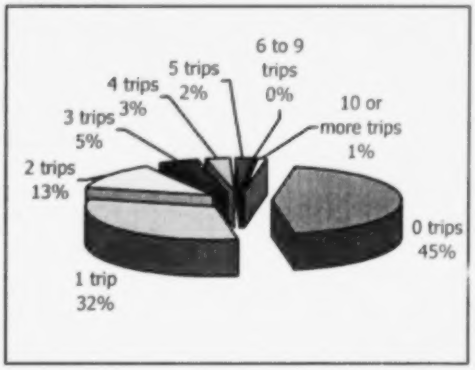


Figure 60

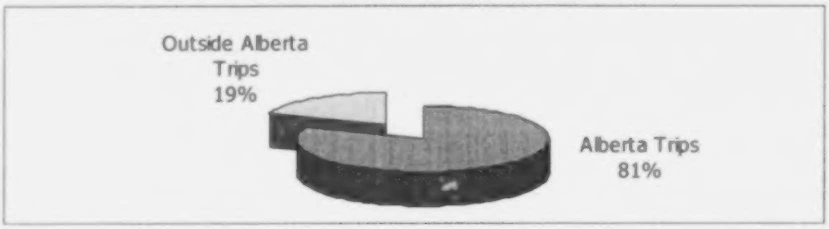
Q.3B How many of these trips will be outside of Alberta? Alberta Central Respondents (n=232)



Destinations

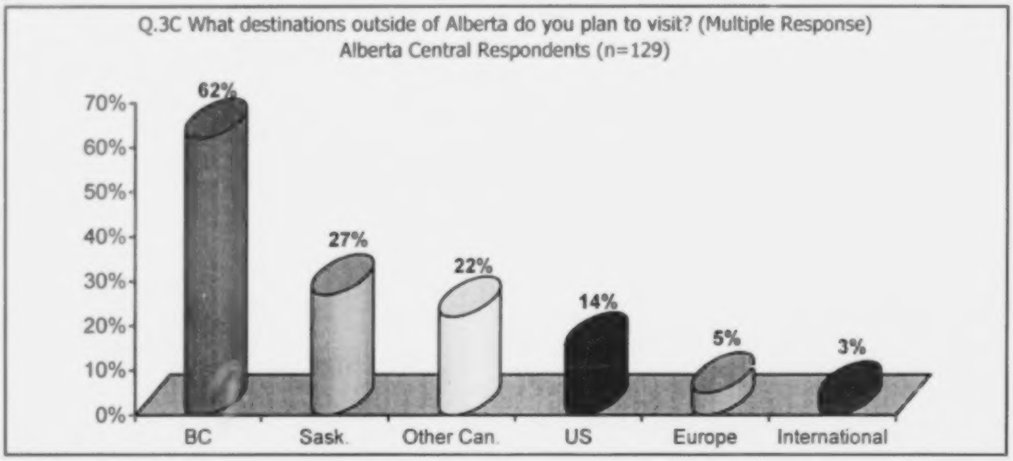
Overall, Of the 1,171 trips planned by Alberta Central respondents, a high eighty-one percent (81%) of these trips are to destinations within Alberta and the remaining 19% are planned for destinations outside of Alberta. (See Figure 61 below)

Figure 61 Percentage of Total Trips Planned by Destination
Alberta Central Respondents (N=1,171 trips)



When asked about intended destinations outside of Alberta, travel within Canada dominates; in particular travel to British Columbia (62%). This is followed by travel to Saskatchewan (27%) and other areas of Canada (22%). Outside of Canada, travel to the U.S.A. was named by 14% of Alberta Central respondents, and a much smaller five percent or less of respondents are planning trips to Europe (5%), or other International destinations (3%). (See Figure 62 below)

Figure 62



Reasons for no travel within Alberta

Almost three-quarters (71%) of Alberta Central respondents who are not planning any leisure trips within Alberta over the next six months indicated they have *"no particular reason"* for not traveling within the province. Another 11% said they have *"no interest in Alberta, and prefer destinations outside Alberta"*. 'Other' reasons given for not planning travel within Alberta are detailed in Table 25 on the following page.

Table 25

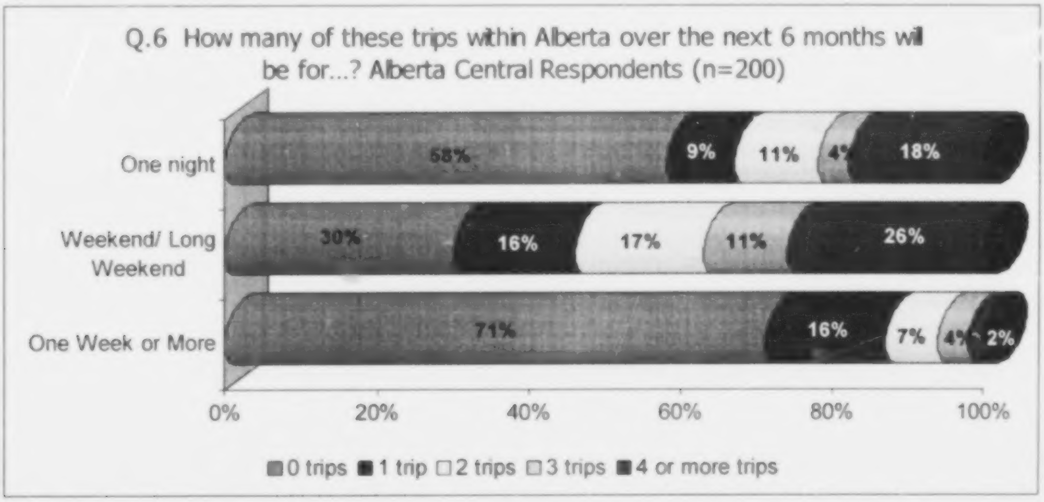
Q.4 Is there any particular reason why you do not intend to make any leisure trips in Alberta in the next 6 months (Multiple Response)	**Alberta Central Respondents n=32**
No particular reason	71.4%
No interest/prefer destinations outside Alberta	10.7%
No time – too busy	7.1%
Other; • Relatives live outside Alberta	10.7% (3) (3)

In-Province Travelers (n=200)

Alberta Central in-province travelers indicated their 2003 travel intentions are either the same for 2003 as in 2002 (67%), or have increased (19%) for 2003 (Q.5). Fourteen percent (14%) plan to travel less in 2003 within the province than they did in 2002.

As many as seventy percent (70%) of in-province travelers plan to take one or more weekend/long weekend trips over the next six months, and 42% plan to take one or more overnight trips, or trips of one week or longer (39%). (Figure 63 below)

Figure 63



Q.6 How many of these trips within Alberta over the next 6 months will be for...? Alberta Central Respondents (n=200)

Of the 946 Alberta trips planned by Alberta Central respondents, over half (53%) will be weekend or long weekend trips. More than a third (35%) of the trips are planned for one night only, and the remaining 12% of trips are planned for one week or longer. (See Figure 64 on the following page)

Table 25

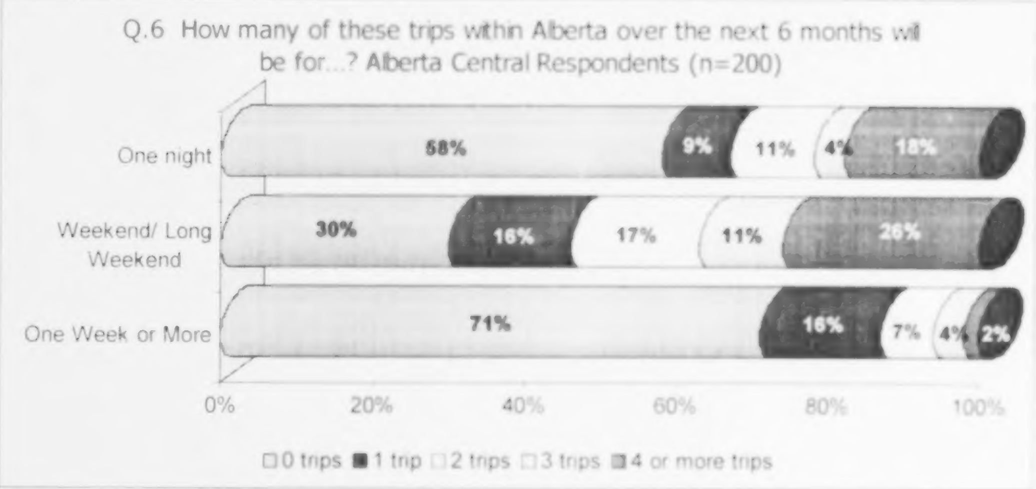
Q.4 Is there any particular reason why you do not intend to make any leisure trips in Alberta in the next 6 months (Multiple Response)	**Alberta Central Respondents n=32**
No particular reason	71.4%
No interest/prefer destinations outside Alberta	10.7%
No time – too busy	7.1%
Other; • Relatives live outside Alberta	10.7% (3) (3)

In-Province Travelers (n=200)

Alberta Central in-province travelers indicated their 2003 travel intentions are either the same for 2003 as in 2002 (67%), or have increased (19%) for 2003 (Q.5). Fourteen percent (14%) plan to travel less in 2003 within the province than they did in 2002.

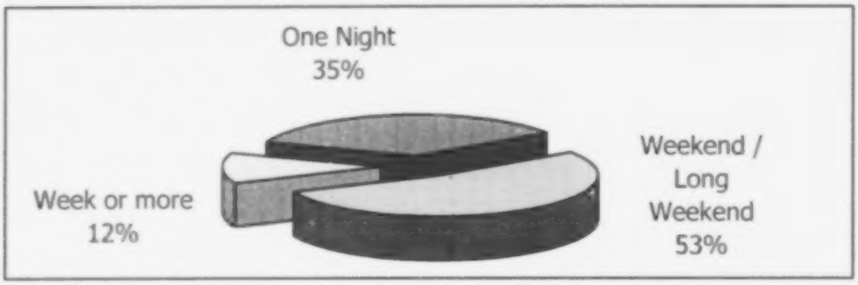
As many as seventy percent (70%) of in-province travelers plan to take one or more weekend/long weekend trips over the next six months, and 42% plan to take one or more overnight trips, or trips of one week or longer (39%). (Figure 63 below)

Figure 63



Of the 946 Alberta trips planned by Alberta Central respondents, over half (53%) will be weekend or long weekend trips. More than a third (35%) of the trips are planned for one night only, and the remaining 12% of trips are planned for one week or longer. (See Figure 64 on the following page)

Figure 64 Percentage of Total Alberta Trips Planned by Trip Length
Alberta Central Respondents (N=946 trips)



Travel Party Size and Planning Trips

Travel party size for weekend trips and week and longer trips over the next six months is expected to range between one to eight persons, with the average travel group being two and three persons.

The range of days needed to plan for weekend trips within the province falls between less than one (1) day up to four (4) months in advance. Planning for trips of one week or longer ranges from one (1) day to eight (8) months in advance. Overall, for this group of respondents, the average number of days they plan in advance for weekend trips is 15.7 days. This is less than one-third of the time they spend planning for a trip of one week or more (47.4 days).

The most frequently reported time period for planning weekend trips is seven (7) days (24%), while the more typical planning time frame for trips of one week or longer is one (1) month (23%). (Table 26 below)

Table 26

Q.7 How many members of your household will be traveling on... (Alberta Central Respondents)	Range	Mean (weighted)	Mode (weighted)	Not Applicable (weighted) *
A. Weekend trips (n=190)	**1 to 8**	**2.67 persons**	**2 persons (41.3%)**	**n=10**
B. Trips of one week or longer (n=168)	**1 to 8**	**2.75 persons**	**2 persons (36.0%)**	**n=32**
Q.8 How many days in advance do you typically plan leisure trips within Alberta for...	**Range**	**Mean (weighted)**	**Mode (weighted)**	**Not Applicable (weighted) ***
A. Weekend trips (n=193)	**0 to 365**	**15.7 days**	**7 days (23.8%)**	**n=7**
B. Trips of one week or longer (n=169)	**0 to 365**	**47.4 days**	**30 days (23.1%)**	**n=31**

**These respondents indicated they do not typically take trips of this length when traveling in Alberta*

Specific Destinations in the Province

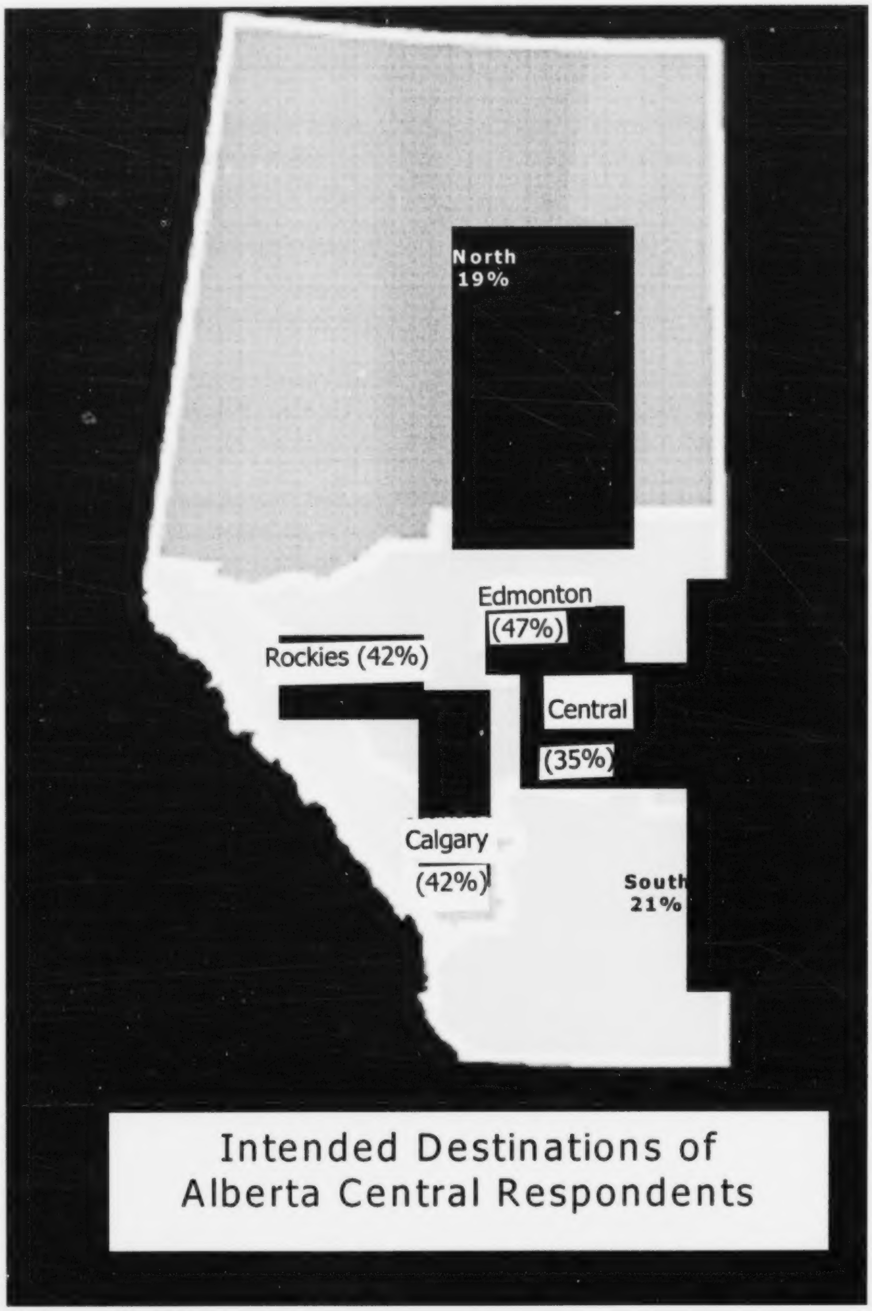
When respondents were asked about the destinations within Alberta they plan to visit over the next six months, the most named destinations are Edmonton & Area (47%) followed by travel to the Canadian Rockies (42%) and Calgary & Area (42%).

Over a third of Alberta Central respondents named destinations within their own region (35%), and another 21% plan to take trips to Alberta South as well as 19% planning trips to Alberta North over the next six months.

(A Flow Map depicting planned travel from this Region is noted as Figure 65 on the following page)

Figure 65 – Flow Map of Alberta Central Respondents Intended Destinations*

**Please note that these results do not take into account the frequency of planned visits to each key destination*


North
19%
Edmonton
(47%)
Rockies (42%)
Central
(35%)
Calgary
(42%)
South
21%
Intended Destinations of
Alberta Central Respondents

Activities

Respondents were asked to indicate how likely they are to participate in a variety of activities while on leisure trips over the next six months. The most popular activity for Alberta Central respondents is *Visiting family and friends* (67% - very likely to participate in this activity); this results in a mean of 3.5 out of 4.

Three (3) of the remaining 16 activities were also indicated by the majority of Alberta Central respondents as activities they would be very likely to participate in over the next six months. These activities include Outdoor Leisure (mean=3.2 out of 4), Outdoor Summer Sports (mean=3.1 out of 4) and Outdoor Recreation (mean=3.0 out of 4).

Four (4) of the activity types are activities they are more likely to participate in than not, and reflect a mean ranging from 2.0 to 2.9. These include: Indoor Leisure activities (2.9 out of 4), Museums & Historical sites (2.8 out of 4) Attractions (2.3 out of 4), and Festivals & Cultural activities (2.2 out of 4).

Less popular activities, with the least likelihood for participation include Team Sports (2.0 out of 4), the Calgary Stampede & Klondike Days (2.0 out of 4), Organized Sports Events (1.9 out of 4), Spectator sports & Entertainment (1.9 out of 4), Outdoor Winter Sports (1.9 out of 4), Aboriginal Attractions (1.7 out of 4), Spas & other Health Club (1.6 out of 4), and Outdoor Adventure activities (1.6 out of 4). (See Table 27 below)

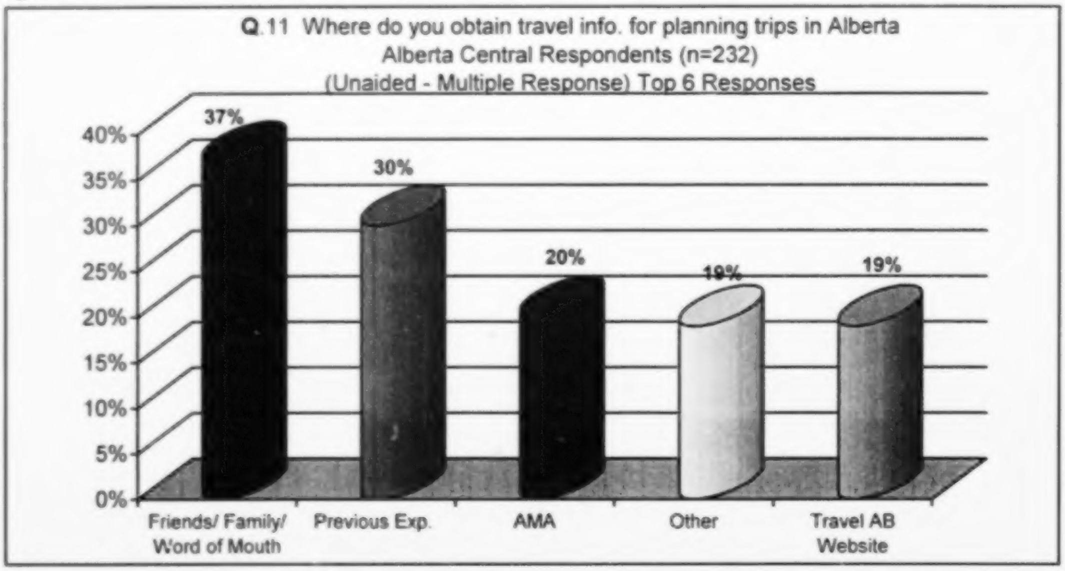
Table 27

Q.10 Activities Alberta Central Respondents (n=232)	Likelihood of Participating in...					Mean
	Very Unlikely	Somewhat Unlikely	Somewhat Likely	Very Likely	Don't Know	
Visit Friends & Relatives	6.0%	1.0%	26.0%	67.0%	0	3.5
Outdoor Leisure	10.0%	8.5%	35.0%	46.5%	0	3.2
Outdoor Summer Sports	18.5%	5.0%	22.5%	54.0%	0	3.1
Outdoor Recreation	21.5%	5.5%	20.5%	52.5%	0	3.0
Indoor Leisure Activities	22.0%	10.5%	23.5%	44.0%	0	2.9
Museums & Historical Sites	23.5%	12.0%	28.5%	36.0%	0	2.8
Attractions	40.5%	13.0%	18.5%	27.5%	0	2.3
Festivals & Cultural Activities	41.0%	13.0%	28.0%	18.0%	0	2.2
Team Sports	50.5%	14.5%	16.5%	18.5%	0	2.0
Calgary Stampede/ Klondike Days	50.5%	14.0%	18.0%	17.5%	0	2.0
Organized Sports Events	52.5%	17.0%	14.0%	16.5%	0	1.9
Spectator Sports & Entertainment	53.5%	11.5%	22.5%	12.5%	0	1.9
Outdoor Winter Sports	53.0%	18.5%	15.5%	13.0%	0	1.9
Aboriginal Attractions	58.0%	20.5%	14.0%	7.5%	0	1.7
Spas & Other Health Club	65.5%	18.0%	6.5%	9.5%	0	1.6
Outdoor Adventure	66.5%	16.5%	8.5%	8.5%	0	1.6

Information Sources

When Alberta Central respondents were asked about the information sources they rely on when planning trips in Alberta, the most frequently mentioned source was *friends, family* or *word-of-mouth* (37%). Close to a third rely on their own previous experience (30%), and twenty percent rely on the AMA (20%). Another 19% use the Travel Alberta website, and 19% named a variety of other sources including; the Internet in general, books, maps, or travel agents. (Figure 66 below)

Figure 66



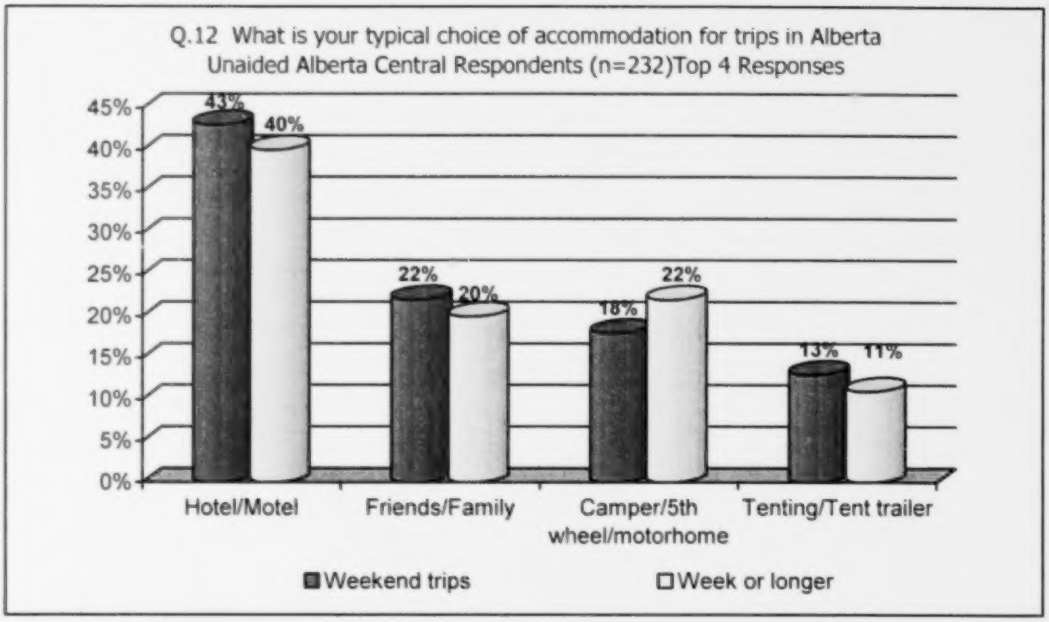
Accommodations

Few differences exist among these respondents when it comes to the typical choice of accommodations for either a weekend trip or trips of one week or longer.

- Forty-three percent (43%) choose to stay in hotels/motels on weekend trips
- Forty percent (40%) choose hotel/motels on week or longer trips
- Twenty-two percent (22%) would stay with friends or family for weekend trips and 20% would do the same for trips of one week and longer.
- Twenty-two percent (22%) of respondents said they would use a Camper/5th wheel or Motorhome on trips of one week or longer, and slightly fewer 18% will choose this type of accommodation for weekend trips
- Thirteen percent (13%) choose to tent or use a tent trailer on weekend trips, while 11% uses this type of accommodation on trips one week or longer

(See Figure 67 on the following page)

Figure 67



Advertising Recall

Respondents were asked if they could recall seeing, hearing or reading any advertising about travel in the previous three months. Almost a half (49%) indicated they could recall travel advertising; this is the highest recall of all Regions. However, when asked about specific details of this advertising the response from this Region is as limited as from other Regions.

The media source with the most recall was brochures (14%), followed by newspapers (11%) and other magazines (11%). 'Other sources' named include the AMA magazine (8%), television (7%), and radio (4%).

Destinations they recalled being advertised were coded into one of the six Tourism Destination Regions (TDR). The most frequent recall is for destinations located in Edmonton & Area (19%) followed by the Canadian Rockies (14%), Alberta South (8%) and Calgary & Area (8%) destinations. Advertising for destinations within Alberta North (7%) or their own Region of Alberta Central (7%) were recalled the least often.

Only a few respondents were able to recall the content of the advertising they had heard or seen. The most frequent recall was about sight-seeing (6%), camping (5%), fishing (3%), the Calgary Stampede (3%) and general events (3%).

Travel Alberta was identified the most often (17%) as the sponsor of this advertising, followed by the AMA (6%) and the Calgary Stampede (2%). No other sponsors were mentioned. (See Table 28 on the following page)

Table 28

Q.13B Please describe the advertising...(Unaided - Multiple Response) Alberta Central Respondents (n=113) Top 6 responses per category							
Media Source		**Destinations**		**Activities**		**Sponsor**	
Brochures	14.4%	Edmonton & Area	18.6%	Sight-seeing	6.2%	Travel Alberta	16.5%
Newspaper	11.3%	Can. Rockies	14.4%	Camping	5.2%	AMA	6.2%
Other Magazines	11.3	Alberta South	8.2%	Fishing	3.1%	Calgary Stampede	2.1%
AMA Magazine	8.2%	Calgary & Area	8.2%	Events in general	3.1%		
TV	7.2%	Alberta North	7.2%	Calgary Stampede	3.1%		
Radio	4.1%	Alberta Central	7.2%	Skiing/ Museums	2.1%		
Do not recall	**45.4%**	**Do not recall**	**48.5%**	**Do not recall**	**75.3%**	**Do not recall**	**86.7%**

The *"Edmonton – Plan on Having Fun"* Campaign

Alberta Central was one of the target groups for the "Edmonton – Plan on having fun" campaign run from May 12, 2003 to May 18, 2003. Of the 113 Alberta Central respondents who said they recalled advertising in the two to three months previous to the study, twenty-five percent (25%) recalled this particular campaign, (28 respondents in total). This was the highest recall of all eligible Regions.

Of the 28 respondents who recalled the campaign, half (50%) said they recalled it from a pamphlet, 33% from the newspaper and 13% recalled seeing the ads on TV. One (1) respondent recalled the campaign in a glossy magazine (4%).

A quarter (25%) of the respondents who recalled the campaign indicated it had impacted their travel plans for the next 6 months.

Global Events

Thirteen percent (13%) of Alberta Central respondents reported their travel plans for the next six months had been impacted by recent global events. Of those, the most frequently named event was the 9/11 events or terrorism in general (68%), followed by the war in Iraq (56%) and the SARS outbreak (48%).

Fuel prices (32%), airline restructuring (20%), the West Nile Virus (16%) and the poor exchange rate (4%) were mentioned by fewer respondents.

When asked how these events have impacted their travel plans, almost half (44%) of respondents who were impacted stated they *"are staying close to home, in Alberta"* or they are "*not flying – only driving*" (24%). Twelve percent of Alberta Central respondents indicated they are taking fewer trips overall (12%), and four percent are staying at home and not traveling anywhere (4%).

Others indicated that global events have stopped them from traveling internationally to the U.S.A. Some have cancelled their travel plans all together, switched airlines, or are traveling with caution. (See Table 29 below)

Table 29 – Alberta Central Respondents (n=29)

Q.15A Have any global events made an impact on your travel plans for the next 6 months?			
Yes	15.8%	No	84.2%
Q.15B Which events in particular had an impact? (Aided - Multiple Response) Alberta Central Respondents (n=29)		**Q.16 How has this/these event(s) impacted your travel plans for the next 6 months (Unaided - Multiple response) Alberta Central Respondents (n=29)**	
9/11 Terrorism in general	68.0%	Staying close to home – in AB	44.0%
SARS	48.0%	Not flying – only driving	24.0%
War in Iraq	58.0%	Taking fewer trips	12.0%
Fuel Prices	32.0%	Staying at home – not traveling	4.0%
Airline restructuring	20.0%	Other;	31.2%
West Nile Virus	16.8%	• Not traveling internationally	(2)
Other	4.0% (1)	• Not traveling to US	(2)
• Poor exchange rate	(1)	• Being careful but still traveling	(2)
		• Delayed/cancelled plans	(1)
		• Switched Airlines	(1)

Demographics

Q.17 Family Composition	
Single parent with children	5.0%
Single Adult Household	14.0
2 Adults with Children	39.5%
2 Adults without Children	38.5%
3 or more Single Adults without children	2.5%
3 or more Single Adults with Children	0
Refused	0.5%

Q.18 Age	
18 to 24 years	11.5%
25 to 34 years	22.5%
35 to 44 years	14.5%
45 to 54 years	23.0%
55 to 64 years	13.0%
65 or older	12.0%
Refused	3.5%

Q.19 Income	
Less than $25,000	10.5%
$25,000 to $49,999	32.0%
$50,000 to $99,999	32.0%
$100,000 and over	6.5%
Refused	19.0%

Q.20 Are you currently an AMA member?	
Yes	40.5%
No	58.0%
Don't Know	1.0%
Refused	0

Q.21 Gender	
Male	36.5%
Female	63.5%

9.0 Alberta South Respondent Profile

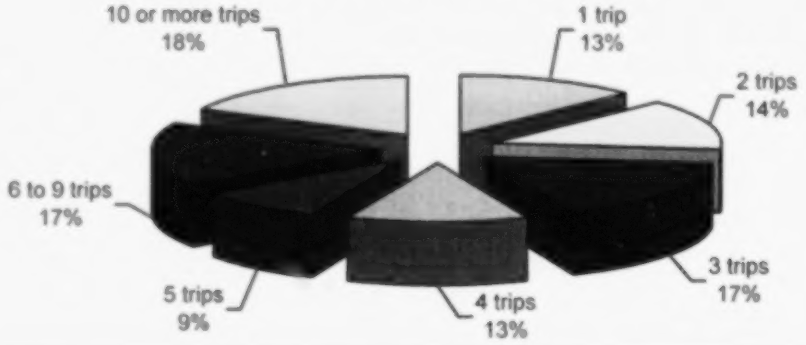
A total of 200 interviews were conducted with Alberta South respondents in May 2003. As the final data set has been weighted to better reflect the actual population distribution of the province of Alberta, these 200 interviews represent 144 interviews when weighting has been applied.

Intended Trips

The number of planned trips among Alberta South respondents over the next six months ranged from one (1) to 60 trips, with an average of 59 trips over the next 6 months. The number of respondents taking between one to five trips over the next six months is evenly distributed with less than twenty percent of respondents who plan to take one trip (13%), two trips (14%), three trips (17%), four trips (13%) or five trips (9%). Seventeen percent of respondents plan on taking between six and nine trips over the next six months, while the remaining 18% plan to take anywhere from ten to sixty trips. (Figure 68 below)

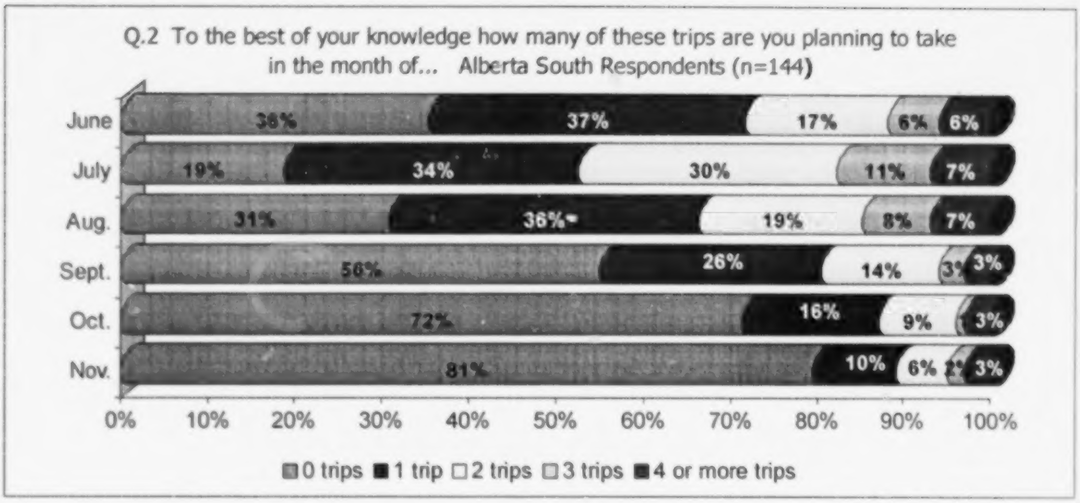
Figure 68

Q.1 How many leisure trips does your household plan to take between June 1 and Nov. 30, 2003?
Alberta South Respondents (n=144)



When asked to indicate how many of these trips will be taken within specific months over the next six months, 81% of Alberta South respondents plan to make one or more trips in July (81%) to Alberta, and/or 69% percent plan to travel in August (69%). Sixty-four percent (64%) of respondents are planning one or more trips in June, and 44% are planning to take one or more trips in September. Less than a third are planning to take one or more trips during October (28%), and 19% plan to take one or more trips during November. (See Figure 69 on the following page)

Figure 69



When looking at the specific months of travel for the 1,158 trips planned by Alberta South respondents over the next 6 months the highest number are planned for the months of July (27%) and August (22%). Twenty percent (20%) of trips are planned for June, and a smaller 13% for September, 9% for October and 7% for November. (Figure 70 below)

Figure 70

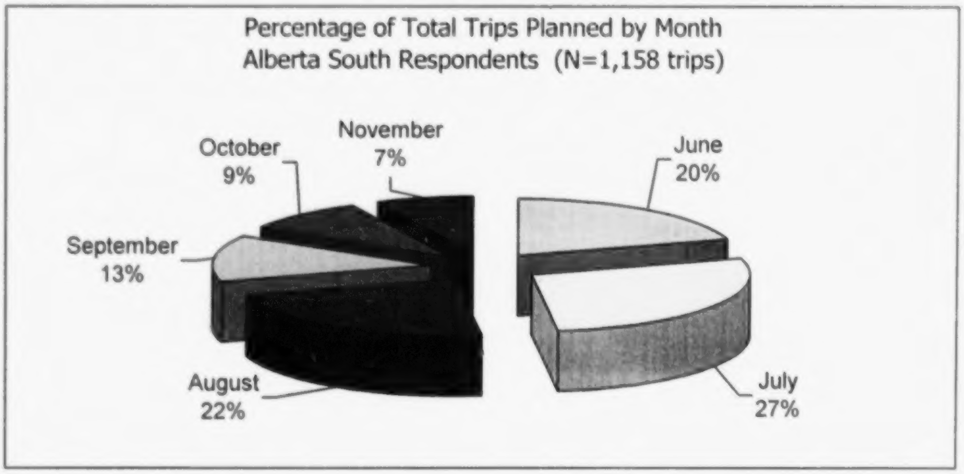
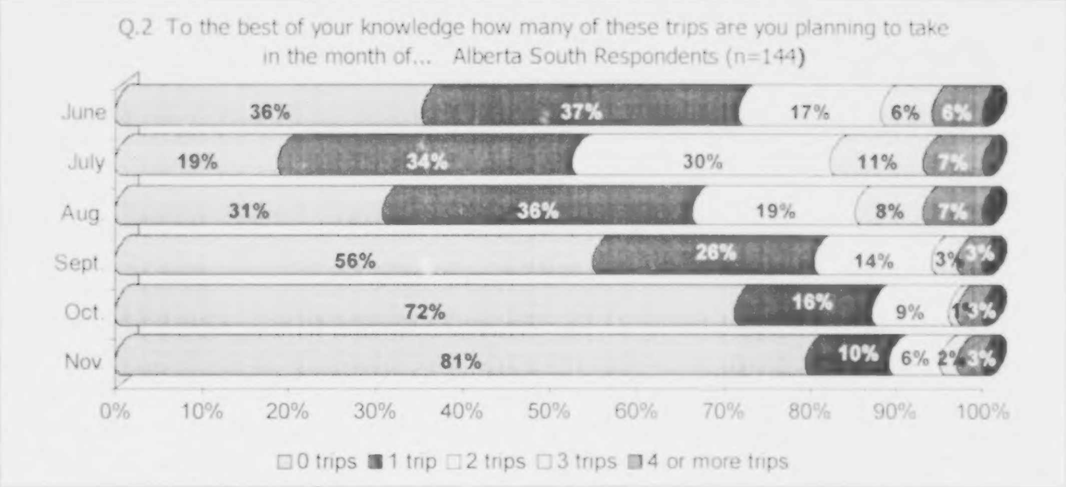
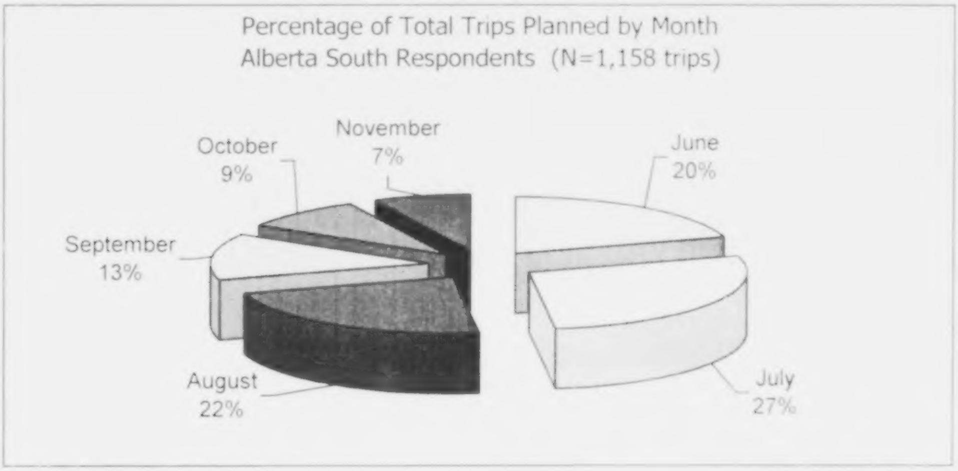


Figure 69


Q.2 To the best of your knowledge how many of these trips are you planning to take in the month of... Alberta South Respondents (n=144)

When looking at the specific months of travel for the 1,158 trips planned by Alberta South respondents over the next 6 months the highest number are planned for the months of July (27%) and August (22%). Twenty percent (20%) of trips are planned for June, and a smaller 13% for September, 9% for October and 7% for November. (Figure 70 below)

Figure 70


Percentage of Total Trips Planned by Month
Alberta South Respondents (N=1,158 trips)

Respondents were further asked to distinguish between their in-province trips and trips outside of Alberta over the next six months: (See Figure 71 and Figure 72 below)

In-Province Travel (Figure 71)

- The majority (76%) plan to take at least one leisure trip within Alberta
- Forty-five percent (45%) plan on taking three or less trips within Alberta
- Forty-one percent (41%) plan on taking four or more trips within Alberta

Next to Alberta North, Alberta South respondents are the second highest to say they will take at least one leisure trip within Alberta over the next 6 months. (Figure 69 below)

Outside Alberta (Figure 70)

When asked about their plans to travel outside of Alberta, over a third of Alberta South respondents (36%) have no plans to leave Alberta for leisure trips over the next six months. Of the 64% who do intend to travel outside of Alberta for leisure:

- 31% are planning one trip
- 17% are planning 2 trips
- 12% are planning between 3 and 4 trips
- 7% intend to take between five (5) and nine trips

Figure 71

Q.3A How many of these trips will be within Alberta? Alberta South Respondents (n=144)

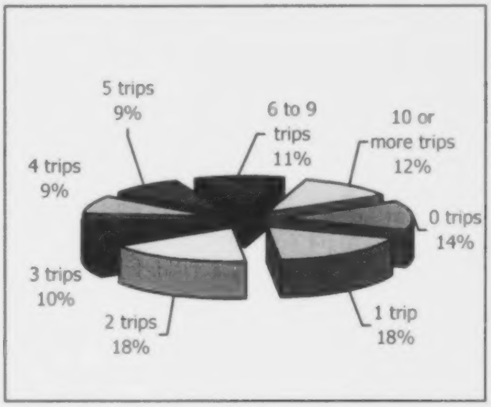
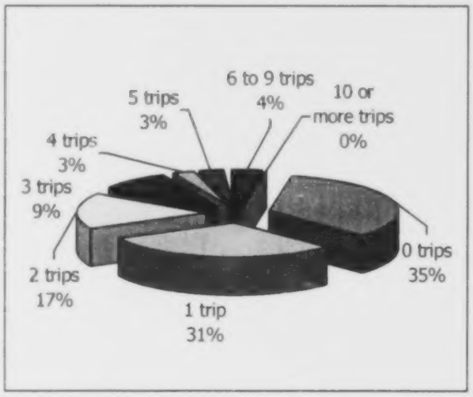


Figure 72

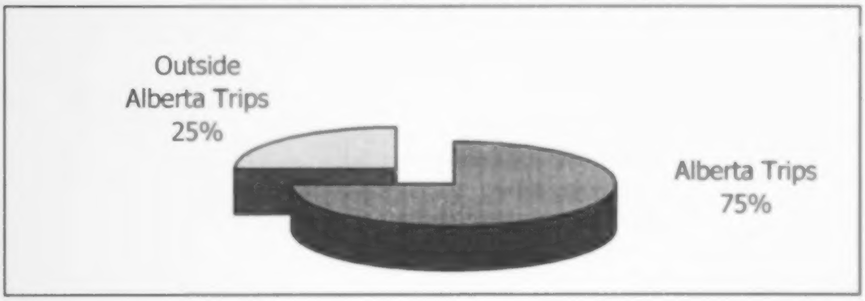
Q.3B How many of these trips will be outside of Alberta? Alberta South Respondents (n=144)



Destinations

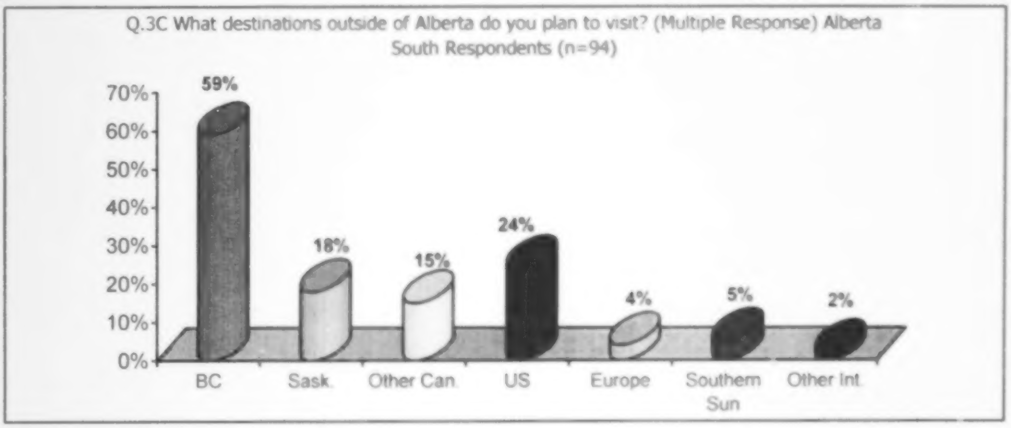
Overall, Of the 1,158 trips planned by Alberta South respondents, three-quarters (75%) of these trips are to destinations within Alberta, and the remaining 25% are planned to destinations outside of Alberta. (See Figure 73)

Figure 73 Percentage of Total Trips Planned by Destination
Alberta South Respondents (N=1,158 trips)



When asked about intended destinations outside of Alberta, travel within Canada dominates; in particular travel to British Columbia (59%). This is followed by travel to Saskatchewan (18%) and other areas of Canada (15%). Outside of Canada, travel to the USA was named by 24% of Alberta South respondents; this is the highest of all regions. A much smaller five percent or less of respondents are planning trips to Southern Sun destinations (5%), Europe (4%), or other International destinations (2%). (See Figure 74 below)

Figure 74



Reasons for no travel within Alberta

Two-thirds (68%) of the Alberta South respondents who are not planning any leisure trips in Alberta over the next six months indicated they have *"no particular reason"* for not traveling within the province. Another 11% said they have *"no interest in Alberta, and prefer destinations outside Alberta"* (11%) or *"no time – too busy"* (11%). Other reasons given by those not planning to travel within Alberta are detailed in Table 30 on the following page.

Table 30

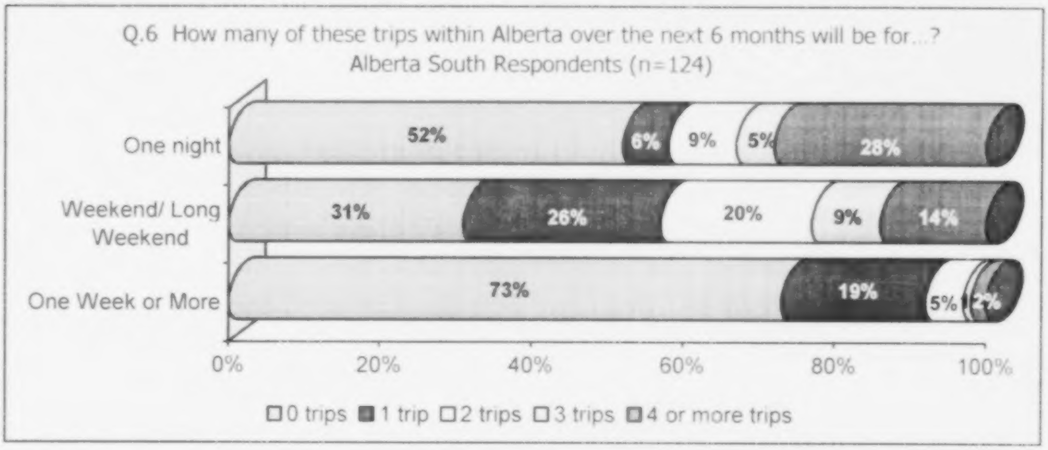
Q.4 Is there any particular reason why you do not intend to make any leisure trips in Alberta in the next 6 months (Multiple Response)	**Alberta South Respondents n=20**
No particular reason	67.9%
No interest/prefer destinations outside Alberta	10.7%
No time – too busy	10.7%
No money – financial	7.1%
Nothing new to do or see in Alberta	3.6%
Other;	14.3% (2)
• Relatives live outside Alberta	(1)
• Bad Weather	(1)

In-Province Travelers (n=124)

Alberta South in-province travelers indicated their 2003 travel intentions are either the same for 2003 (65%) as they were in 2002, or have increased by 25% for 2003 (Q.5). The remaining 10% percent plan to travel less in 2003 than they did in 2002.

Sixty-nine percent (69%) of these respondents intend to take one or more weekend/long weekend trips over the next six months, while a smaller 48% plan to take one or more overnight trips, or trips of one week or longer (27%). (Figure 75 below)

Figure 75



Q.6 How many of these trips within Alberta over the next 6 months will be for...?
Alberta South Respondents (n=124)

Of the 874 Alberta trips planned by Alberta South respondents, over half (52%) will be for one night only; this is the highest of all regions. More than a third (39%) of the trips is planned for weekend or long weekends, while the remaining 8% of trips are planned for one week or longer. (Figure 76 on the following page)

Table 30

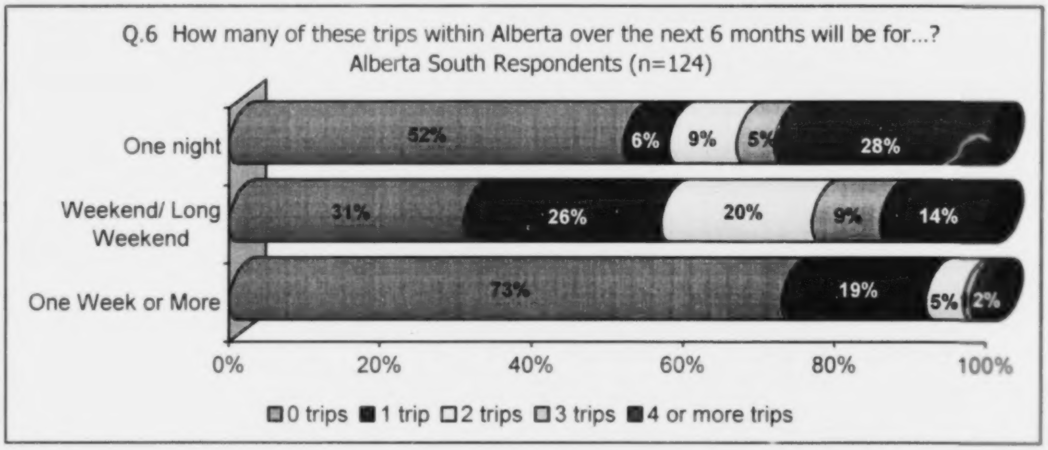
Q.4 Is there any particular reason why you do not intend to make any leisure trips in Alberta in the next 6 months (Multiple Response)	**Alberta South Respondents n=20**
No particular reason	67.9%
No interest/prefer destinations outside Alberta	10.7%
No time – too busy	10.7%
No money – financial	7.1%
Nothing new to do or see in Alberta	3.6%
Other; • Relatives live outside Alberta • Bad Weather	14.3% (2) (1) (1)

In-Province Travelers (n=124)

Alberta South in-province travelers indicated their 2003 travel intentions are either the same for 2003 (65%) as they were in 2002, or have increased by 25% for 2003 (Q.5). The remaining 10% percent plan to travel less in 2003 than they did in 2002.

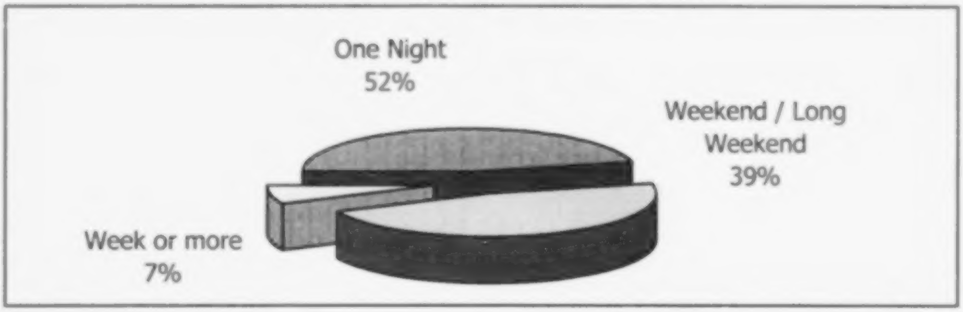
Sixty-nine percent (69%) of these respondents intend to take one or more weekend/long weekend trips over the next six months, while a smaller 48% plan to take one or more overnight trips, or trips of one week or longer (27%). (Figure 75 below)

Figure 75



Of the 874 Alberta trips planned by Alberta South respondents, over half (52%) will be for one night only; this is the highest of all regions. More than a third (39%) of the trips is planned for weekend or long weekends, while the remaining 8% of trips are planned for one week or longer. (Figure 76 on the following page)

Figure 76 Percentage of Total Alberta Trips Planned by Trip Length
Alberta South Respondents (N=874 trips)



Travel Party Size and Planning Trips

Travel party size for weekend trips and for week or longer trips over the next six months, is expected to range between one to six persons, with the average travel group falling between two and three persons.

The range of days needed to plan weekend trips within Alberta falls between less than 1 day to three months in advance. Planning ranges from 1 day to six months in advance for a week or longer trip. Overall, for this group of respondents, the average number of days they plan in advance for weekend trips is 14.1 days. This is less than one-half the time they require to plan in advance for taking a trip of one week or more within the province (31.6 days). Of all regions. Alberta South travelers require the least time to plan trips of one week or longer.

For these respondents, the most frequently reported time period for planning weekend trips is 7 days (23%), and a typical time frame for planning trips of one week or longer is a month (22%). (Table 31 below)

Table 31

Q.7 How many members of your household will be traveling on...: (Alberta South Respondents)	Range	Mean (weighted)	Mode (weighted)	Not Applicable (weighted)*
A. Weekend trips (n=120)	**1 to 6**	**2.62 persons**	**2 persons (40.1%)**	**n=4**
B. Trips of one week or longer (n=111)	**1 to 6**	**2.43 persons**	**2 persons (40.7%)**	**n=13**
Q.8 How many days in advance do you typically plan leisure trips within Alberta for...	**Range**	**Mean (weighted)**	**Mode (weighted)**	**Not Applicable (weighted)***
A. Weekend trips (n=122)	**0 to 90**	**14.1 days**	**7 days (23.3%)**	**n=2**
B. Trips of one week or longer (n=110)	**0 to 180**	**31.6 days**	**30 days (21.6%)**	**n=14**

**These respondents indicated they do not typically take trips of this length when traveling in Alberta*

Specific Destinations in the Province

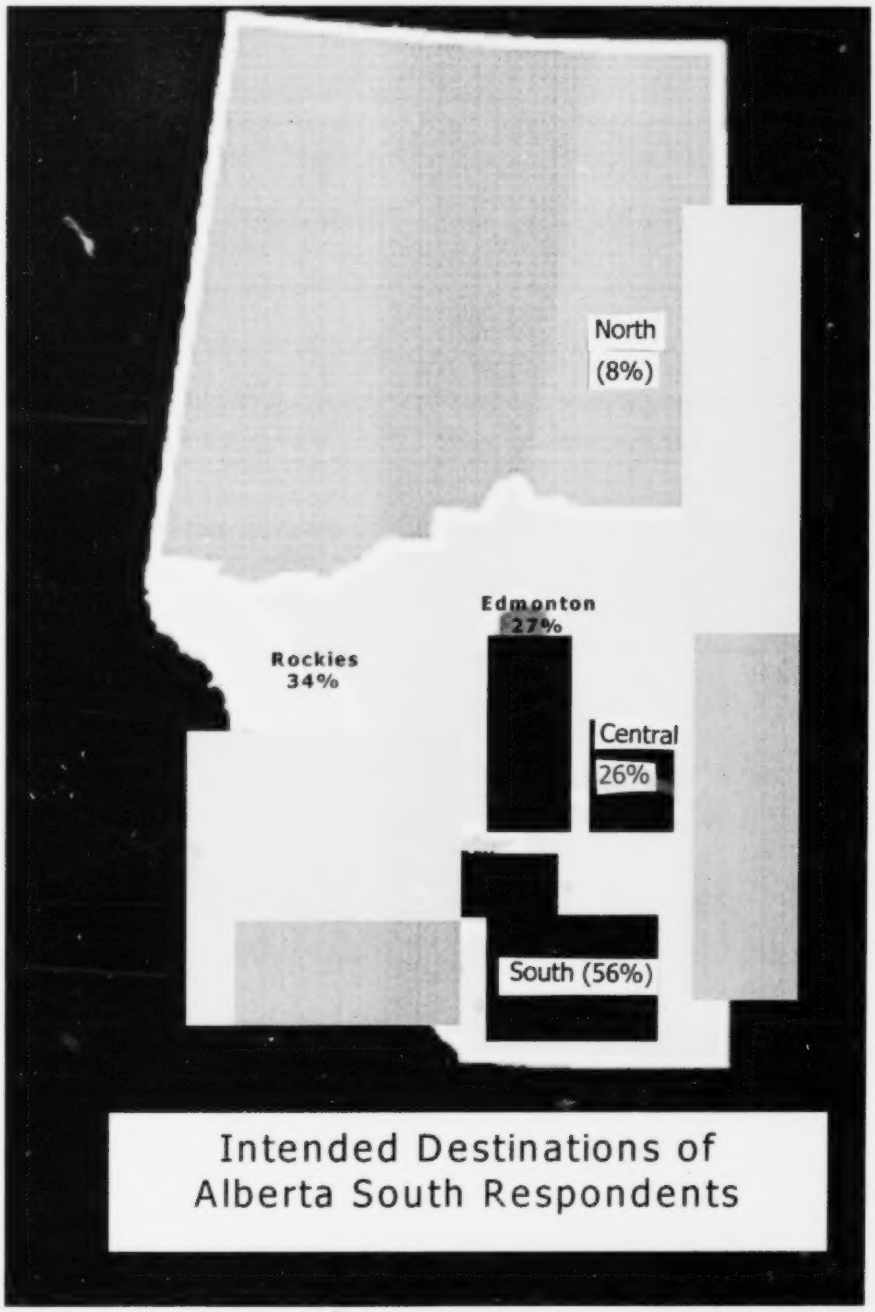
When respondents were asked about the destinations they plan to visit over the next six months, the most named destinations in Alberta is Calgary & Area (66%), followed by Alberta South (56%) and the Canadian Rockies (34%).

Over the next six months, more than a quarter of Alberta South respondents will take trips to destinations within Edmonton & Area (27%), and 26% plan to take trips to Alberta Central. A very small number (8%) will travel to the Alberta North Region.

(A Flow Map depicting planned travel from this Region is noted as Figure 77 on the following page)

Figure 77 – Flow Map of Alberta South Respondents Intended Destinations*

**Please note that these results do not take into account the frequency of planned visits to each key destination*


North
(8%)
Edmonton
27%
Rockies
34%
Central
26%
South (56%)
Intended Destinations of
Alberta South Respondents

Activities

Respondents were then asked to indicate how likely they are to participate in a variety of activities while on leisure trips over the next six months. The most popular activity for Alberta South respondents is *Visiting family and friends*, (69% - very likely to participate in this activity); this results in a mean of 3.6 out of 4.

Three (3) of the remaining 16 activities were also indicated by the majority of respondents as activities they would be *very likely* to participate in over the next six months. These activities include; Outdoor Recreation (mean=3.3 out of 4), Outdoor Leisure (mean= 3.2 out of 4), and Outdoor Summer Sports (mean=3.0 out of 4).

Seven (7) of the activity types they are more likely to participate in than not, reflect a mean that ranges from 2.0 to 2.9 . These include: Indoor Leisure activities (2.9 out of 4), Museums & Historical sites (2.5 out of 4), Attractions (2.4 out of 4), the Calgary Stampede & Klondike Days (2.3 out of 4), Festivals & Cultural activities (2.3 out of 4), Team Sports (2.1 out of 4) and Outdoor Adventure activities (2.1 out of 4).

Less popular activities, with the least likelihood for participation include Outdoor Winter Sports (2.0 out of 4) and Aboriginal Attractions (2.0 out of 4), Spectator Sports & Entertainment (1.9 out of 4), Organized Sports Events (1.8 out of 4), and Spas & other Health Club (1.7 out of 4). (See Table 32 below)

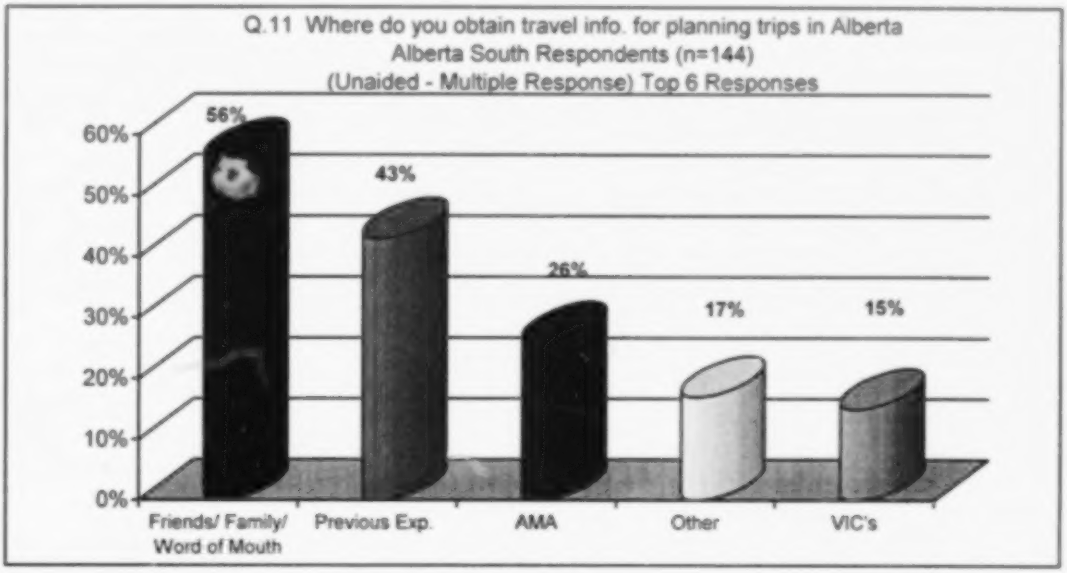
Table 32

Q.10 Activities Alberta South Respondents (n=144)	Likelihood of Participating in...					Mean
	Very Unlikely	Somewhat Unlikely	Somewhat Likely	Very Likely	Don't Know	
Visit Friends & Relatives	3.0%	2.5%	26.0%	68.5%	0	3.6
Outdoor Recreation	11.0%	6.5%	23.0%	59.0%	0.5%	3.3
Outdoor Leisure	8.5%	10.5%	34.0%	47.0%	0	3.2
Outdoor Summer Sports	13.5%	11.0%	33.5%	42.0%	0	3.0
Indoor Leisure Activities	19.0%	12.5%	34.5%	34.0%	0	2.8
Museums & Historical Sites	27.5%	18.0%	34.5%	20.0%	0	2.5
Attractions	27.0%	26.5%	27.0%	19.5%	0	2.4
Festivals & Cultural Activities	35.0%	19.5%	29.0%	16.5%	0	2.3
Calgary Stampede/ Klondike Days	33.5%	21.0%	25.5%	20.0%	0	2.3
Team Sports	34.5%	32.5%	21.5%	11.5%	0	2.1
Outdoor Adventure	38.0%	27.0%	26.5%	8.5%	0	2.1
Outdoor Winter Sports	39.5%	31.0%	21.0%	8.5%	0	2.0
Aboriginal Attractions	43.0%	28.0%	19.0%	10.0%	0	2.0
Spectator Sports & Entertainment	44.5%	28.0%	22.5%	5.0%	0	1.9
Organized Sports Events	47.0%	28.5%	17.5%	7.0%	0	1.8
Spas & Other Health Club	48.0%	34.5%	14.0%	3.5%	0	1.7

Information Sources

When Alberta South respondents were asked about the information sources they rely on when planning trips in Alberta, the most frequently mentioned source was *friends, family* or *word-of-mouth* (56%). Forty-three percent (43%) of these respondents rely on their previous experiences (43%), and a quarter relies on the AMA (26%). Another 15% use the Tourist Information Centres, and 17% named other sources including the Internet. (Figure 78 below)

Figure 78



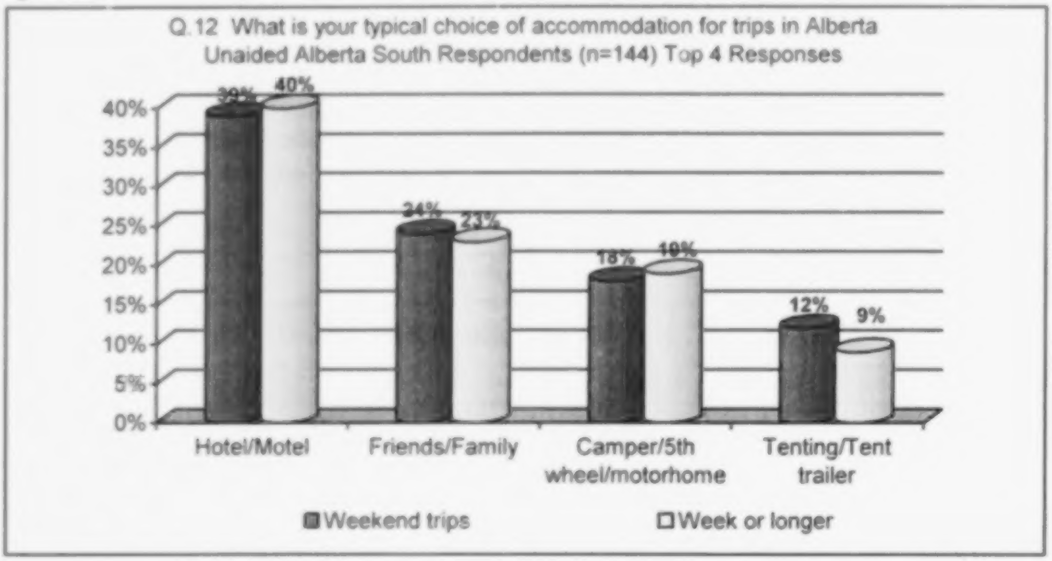
Accommodations

Few differences exist among these respondents when it comes to the typical choice of accommodations for either a weekend trip or trips of one week or longer.

- Thirty-nine percent (39%) choose to stay in hotels/motels on weekend trips
- Forty percent (40%) choose hotel/motels for one week or longer trips
- Less than a quarter (24%) would stay with friends or family for weekend trips and 23% would do the same for trips of one week and longer
- Nineteen percent (19%) would use a Camper/5th wheel or Motorhome on trips of one week or longer, while 18% will choose this type of accommodation for weekend trips
- Twelve percent (12%) will tent or use a tent trailer on weekend trips, while 9% will use this type of accommodation on trips of one week or longer

(See Figure 79 on the following page)

Figure 79



Advertising Recall

Respondents were asked if they could recall seeing, hearing or reading any advertising about travel in the previous two to three months. Under a quarter (22%) indicated they could recall travel advertising; this is the lowest recall of all Regions. When asked about specific details of this advertising the response was as limited as other Regions.

The media source with the most recall was the newspaper (16%), distantly followed by TV (9%), brochures (7%) and flyers (7%). 'Other sources' included other magazines (5%), radio (5%) and travel guides (5%).

Destinations they recall being advertised are coded into one of the six Tourism Destination Regions (TDR). The most frequent recall is for destinations located in Calgary & Area (14%) followed by the Canadian Rockies (9%) and Alberta South (7%) destinations. Destinations within Edmonton & Area (5%) were recalled less often, while there was no recall of any destination advertising for Alberta Central and Alberta North.

Only a few respondents were able to recall any of the content of this advertising. The most frequent recall was advertising on activities in general (21%), sight-seeing (12%), hotels (12%), camping (5%) and the Calgary Stampede (5%).

Travel Alberta was identified the most often (9%) as the sponsor of this advertising, followed by Calgary Tourism (5%), the AMA (2%), the National Parks (2%) and the Calgary Stampede (2%). No other sponsors were mentioned. (See Table 33 on the following page)

Table 33

Q.13B Please describe the advertising...(Unaided - Multiple Response)
Alberta South Respondents (n=31)
Top 6 responses per category

Media Source		**Destinations**		**Activities**		**Sponsor**	
Newspaper	16.3%	Calgary & Area	14.0%	Activities in general	20.9%	Travel Alberta	9.3%
TV	9.3%	Can. Rockies	9.3%	Sight-seeing	11.6%	Calgary Tourism	4.7%
Brochures	7.0%	Alberta South	7.0%	Hotels/ Motels	11.6%	Calgary Stampede	2.3%
Flyers	7.0%	Edmonton & Area	4.7%	Camping	4.7%	AMA	2.3%
Other magazines	4.7%	Alberta North	0	Calgary Stampede	4.7%	National Parks	2.3%
Radio	4.7%	Alberta South	0	Golf / Events in general	2.3%		
Do not recall	**48.9%**	**Do not recall**	**67.4%**	**Do not recall**	**51.2%**	**Do not recall**	**79.1%**

The *"Edmonton – Plan on Having Fun"* Campaign

Although Alberta South respondents were not one of the target groups for the "Edmonton – Plan on having fun" campaign that ran from May 12, 2003 to May 18, 2003, eight percent (8%) or two (2) respondents still mentioned this campaign. Both said they could recall the campaign from TV, and one also said they recalled the campaign from the newspaper or a glossy magazine. One respondent indicated the campaign had impacted their travel plans for the next 6 months.

Global Events

Fourteen percent (14%) of Alberta South respondents reported their travel plans for the next six months had been impacted by recent global events. The most frequently named events was the SARS outbreak (63%), the war in Iraq (59%) and the 9/11 events or terrorism in general (41%).

The airline restructuring (11%), the West Nile Virus (4%) and fuel prices (4%) were mentioned by fewer respondents.

When asked how these events have impacted their travel plans, almost half of respondents who were impacted stated *"they are staying close to home, in Alberta"* (48%) while less than twenty percent each indicated they were "*not flying – only driving*" (19%) or are *"taking fewer trips"* (19%). Seven percent (7%) of Alberta South respondents indicated they were staying at home and not traveling anywhere.

Others reported that global events have stopped them from traveling internationally, or they are traveling with caution. On the other hand, one Alberta South respondent indicated that due to the reduced cost of travel associated with global events they are traveling more. (Se Table 34 on following page)

Table 34 – Alberta South Respondents (n=27)

Q.15A Have any global events made an impact on your travel plans for the next 6 months?			
Yes	13.5%	No	86.5%
Q.15B Which events in particular had an impact? (Aided - Multiple Response) Alberta South Respondents (n=27)		**Q.16 How has this/these event(s) impacted your travel plans for the next 6 months (Unaided - Multiple response) Alberta South Respondents (n=27)**	
SARS	63.0%	Staying close to home – in AB	48.1%
War in Iraq	59.3%	Not flying – only driving	18.5%
9/11 Terrorism in general	40.7%	Taking fewer trips	18.5%
Fuel Prices	3.7%	Staying at home – not traveling	7.4%
Airline restructuring	11.1%	Other;	11.1%
West Nile Virus	3.7%	• Not traveling internationally	(1)
		• Being careful but still traveling	(1)
		• Traveling more - cheaper	(1)

Demographics

Q.17 Family Composition		**Q.18 Age**	
Single parent with children	3.0%	18 to 24 years	14.0%
Single Adult Household	16.0%	25 to 34 years	16.0%
2 Adults with Children	40.5%	35 to 44 years	22.5%
2 Adults without Children	38.5%	45 to 54 years	16.5%
3 or more Single Adults without children	1.5%	55 to 64 years	14.0%
3 or more Single Adults with Children	0	65 or older	10.5%
Refused	0.5%	Refused	6.5%
Q.19 Income		**Q.20 Are you currently an AMA member?**	
Less than $25,000	14.5%	Yes	45.5%
$25,000 to $49,999	35.5%	No	53.5%
$50,000 to $99,999	25.5%	Don't Know	1.0%
$100,000 and over	7.0%	Refused	0
Refused	17.5%		
Q.21 Gender			
Male	58.0%		
Female	42.0%		

10.0 Canadian Rockies Respondent Profile

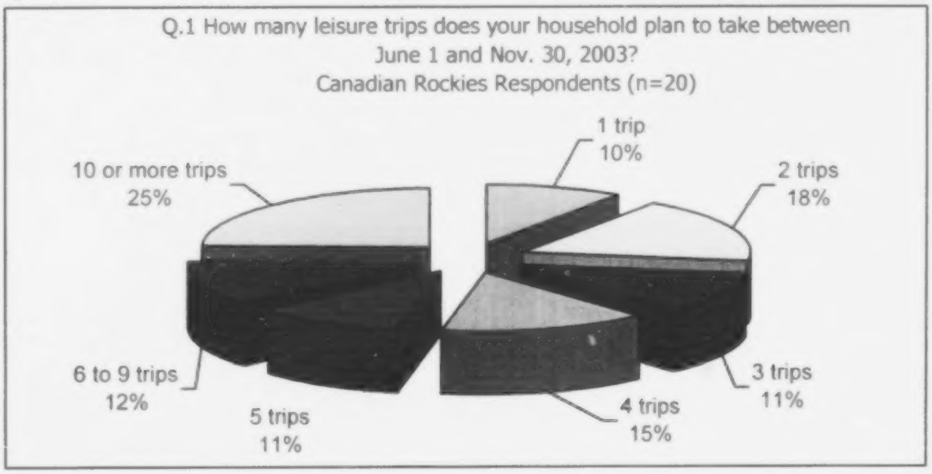
A total of 102 interviews were conducted with Canadian Rockies respondents in May 2003. As the final data set has been weighted to better reflect the actual population distribution of the province of Alberta, these 102 interviews represent 20 interviews when weighting has been applied.

Intended Trips

The number of planned trips among Canadian Rockies respondents over the next six months range from one (1) to 30 trips, with these respondents averaging 6.20 trips over the next 6 months.

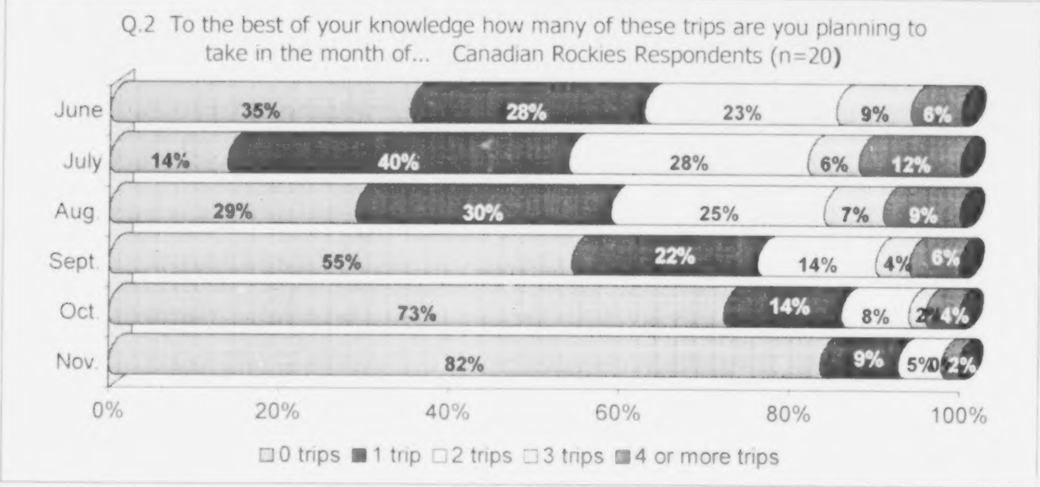
The number of respondents taking between one to five trips over the next six months is evenly distributed with less than twenty percent each planning to take one trip (10%), two trips (18%), three trips (11%), four trips (15%) or five trips (11%). Twelve percent (12%) of respondents plan on taking between six and nine trips over the next six months, while the remaining 25% plan to take anywhere from ten to thirty trips over the next six months. (Figure 80 below)

Figure 80



When asked to indicate how many of these trips will be taken within specific months over the next six months, more than eighty percent of respondents said they plan to take one or more trips during July (86%) and 71% are planning one or more trips for August. Sixty-five percent (65%) of respondents are planning one or more trips in June, and 45% are planning to take one or more trips during September. Almost a third are planning to take one or more trips during October (27%), and a smaller 18% plan to take one or more trips during November. (See Figure 81 on the following page)

Figure 81



When looking at the specific months of travel for the 632 trips planned by Canadian Rockies respondents over the next 6 months, the highest number are planned for the months of July (27%) and August (23%). Twenty percent (20%) of trips are planned for June, and a smaller 14% are planned for September. Fewer trips are planned for October (9%) and November (6%). (Figure 82 below)

Figure 82

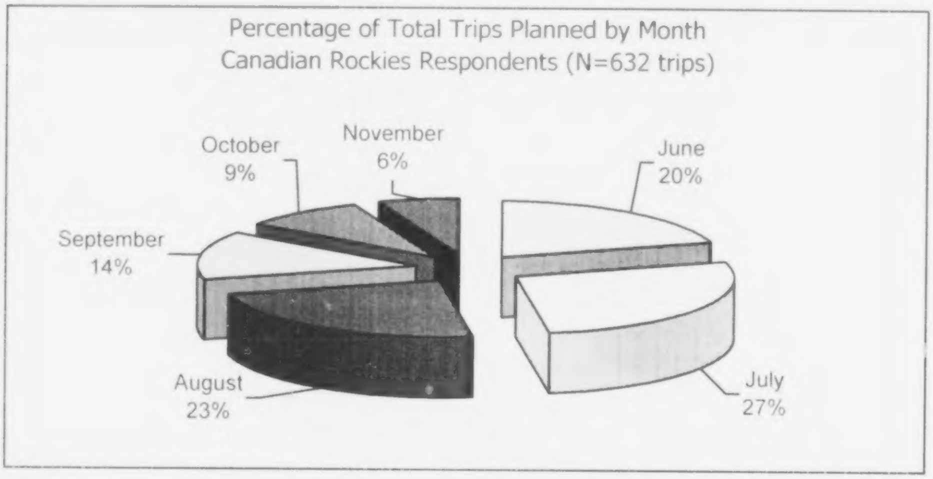
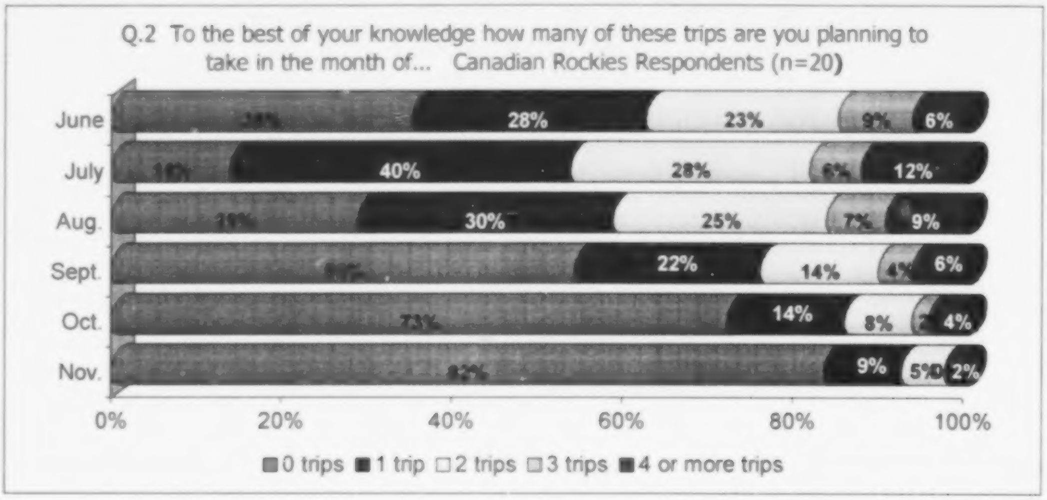


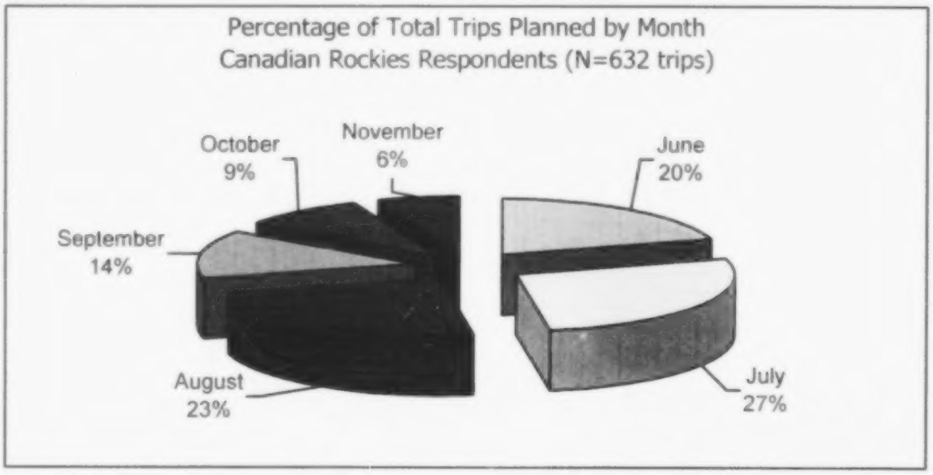
Figure 81



Q.2 To the best of your knowledge how many of these trips are you planning to take in the month of... Canadian Rockies Respondents (n=20)

When looking at the specific months of travel for the 632 trips planned by Canadian Rockies respondents over the next 6 months, the highest number are planned for the months of July (27%) and August (23%). Twenty percent (20%) of trips are planned for June, and a smaller 14% are planned for September. Fewer trips are planned for October (9%) and November (6%). (Figure 82 below)

Figure 82



Percentage of Total Trips Planned by Month
Canadian Rockies Respondents (N=632 trips)

Respondents were asked to distinguish between their in-province trips and trips outside of Alberta: (See Figure 83 and Figure 84 below)

In-Province Travel Figure 83

- The majority (86%) intend to take at least one leisure trip within Alberta
- Forty-nine percent (49%) plan on taking three or less trips
- Over a third (37%) plan on taking four or more trips within Alberta

Of all Regions, Canadian Rockies respondents are the most likely to say they will take two leisure trips within Alberta over the next 6 months.

Outside Alberta Figure 84

When asked about their plans to travel outside of Alberta, less than one-quarter of Canadian Rockies respondents (23%) do not intend to leave Alberta for leisure trips over the next six months. Of the 77% who do intend to travel outside of Alberta for leisure:

- 23% are planning one trip
- 29% are planning 2 trips
- 13% are planning 3 and 4 trips
- The remaining 14% are planning to take between five (5) and 17 trips

Figure 83

Q.3A How many of these trips will be within Alberta? Canadian Rockies Respondents (n=20)

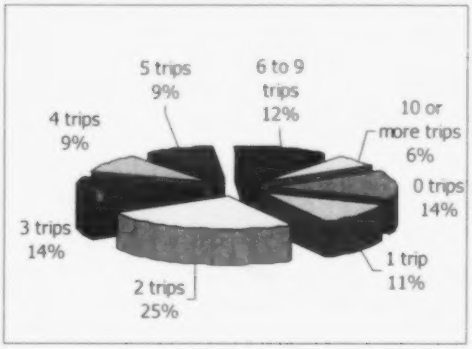
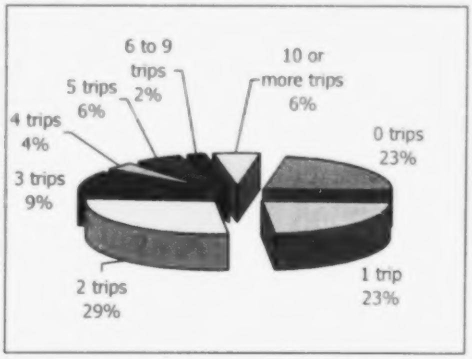


Figure 84

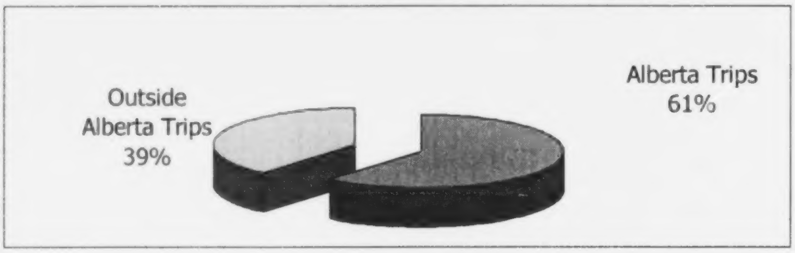
Q.3B How many of these trips will be outside of Alberta? Canadian Rockies Respondents (n=20)



Destinations

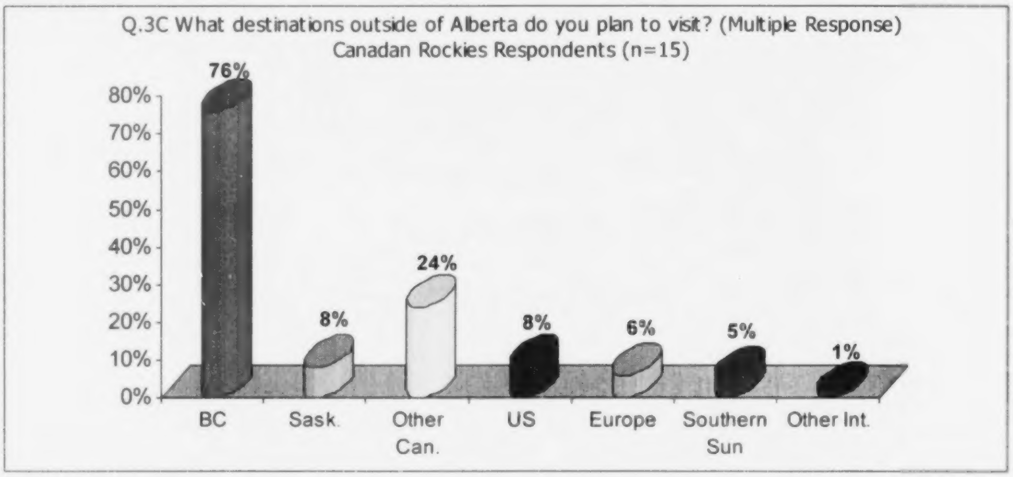
Overall, of the 632 trips planned by Canadian Rockies respondents, sixty-one percent (61%) are to destinations within Alberta, and the remaining 39% are planned for destinations outside of Alberta. (See Figure 85)

Figure 85 Percentage of Total Trips Planned by Destination
Canadian Rockies Respondents (N=632 trips)



When asked about intended destinations outside of Alberta, travel within Canada dominates, in particular travel to British Columbia (76%). This is followed by travel to the rest of Canada (24%) and Saskatchewan (8%). Outside of Canada, travel to the USA. was named by 8% of Canadian Rockies respondents, and a much smaller number are planning trips to Europe (6%), Southern Sun (5%), or other International destinations (1%). (See Figure 86 below)

Figure 86



Reasons for no travel within Alberta

Half (50%) of all Canadian Rockies respondents who are not planning any leisure trips in Alberta over the next six months indicated they have *"no particular reason"* for not traveling within the province. Another 14% said they have *"no interest in Alberta, and prefer destinations outside Alberta"* (14%), or they have *"no money-financial"* reasons. Other reasons given by those not planning to travel within Alberta are detailed in Table 35 on the following page.

Table 35

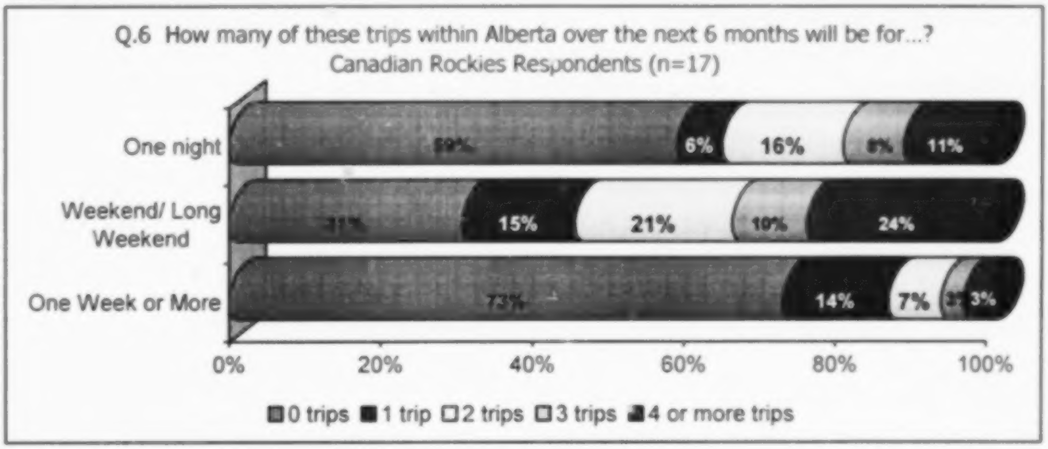
Q.4 Is there any particular reason why you do not intend to make any leisure trips in Alberta in the next 6 months (Multiple Response)	**Canadian Rockies Respondents n=3**
No particular reason	50.0%
No money – financial	14.3%
Nothing new to see or do in Alberta	14.3%
No interest/prefer destinations outside Alberta	7.1%
No time – too busy	7.1%
Other;	7.1% (1)
• Relatives live outside Alberta	(1)

In-Province Travelers (n=17)

Canadian Rockies in-province travelers indicated their 2003 travel intentions are either the same in 2003 as in 2002 (71%), or have increased (15%) for 2003 (Q.5). The remaining fourteen percent (14%) plan to travel less in 2003 than they did in 2002.

Sixty-nine percent (69%) intend to take one or more weekend/long weekend trips over the next six months, while 41% plan to take one or more overnight trips (41%). More than a quarter will take trips within Alberta of one week or longer (27%). (Figure 87 below)

Figure 87



Of the 386 trips that are planned within Alberta by Canadian Rockies respondents, over half (55%) will be for weekend or long weekend trips. Less than a third (30%) of the trips will be for one night only, with the remaining 12% for one week or longer. (See Figure 88 on the following page).

Table 35

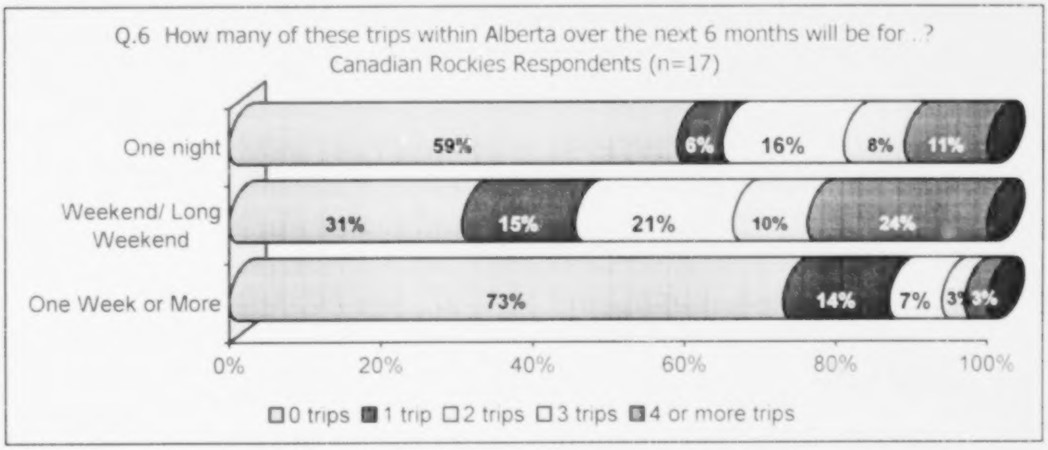
Q.4 Is there any particular reason why you do not intend to make any leisure trips in Alberta in the next 6 months (Multiple Response)	**Canadian Rockies Respondents n=3**
No particular reason	50.0%
No money – financial	14.3%
Nothing new to see or do in Alberta	14.3%
No interest/prefer destinations outside Alberta	7.1%
No time – too busy	7.1%
Other; • Relatives live outside Alberta	7.1% (1) (1)

In-Province Travelers (n=17)

Canadian Rockies in-province travelers indicated their 2003 travel intentions are either the same in 2003 as in 2002 (71%), or have increased (15%) for 2003 (Q.5). The remaining fourteen percent (14%) plan to travel less in 2003 than they did in 2002.

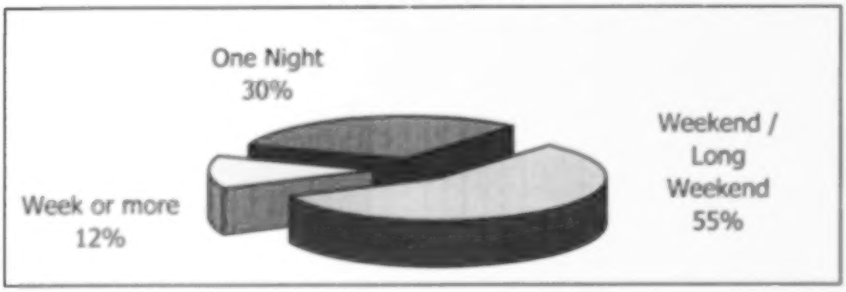
Sixty-nine percent (69%) intend to take one or more weekend/long weekend trips over the next six months, while 41% plan to take one or more overnight trips (41%). More than a quarter will take trips within Alberta of one week or longer (27%). (Figure 87 below)

Figure 87



Of the 386 trips that are planned within Alberta by Canadian Rockies respondents, over half (55%) will be for weekend or long weekend trips. Less than a third (30%) of the trips will be for one night only, with the remaining 12% for one week or longer. (See Figure 88 on the following page).

Figure 88 Percentage of Total Alberta Trips Planned by Trip Length
Canadian Rockies Respondents (N=386 trips)



Travel Party Size and Planning Trips

Travel party size for weekend trips and for one week or longer over the next six months is expected to range between one to nine persons, with the average travel group being two and three persons.

The range of days needed to plan both weekend trips, or trips of one week or longer, within the province fall between less than one (1) day to One (1) year in advance. Overall, for this group of respondents, the average number of days of advance planning for weekend trips is 14.1 days. This is less than half the time they advance plan for taking a trip of one week or more within the province (31.6 days).

The most frequently reported time period for planning weekend trips is 7 days (38%), while the more typical planning time frame for a trip of one week or longer is one month (22%). (Table 36 below)

Table 36

Q.7 How many members of your household will be traveling on... (Canadian Rockies Respondents)	Range	Mean (weighted)	Mode (weighted)	Not Applicable (weighted)*
A. Weekend trips (n=17)	**1 to 9**	**2.53 persons**	**2 persons (42.0%)**	**n=0**
B. Trips of one week or longer (n=15)	**1 to 9**	**2.54 persons**	**2 persons (42.0%)**	**n=2**
Q.8 How many days in advance do you typically plan leisure trips within Alberta for...	**Range**	**Mean**	**Mode (weighted)**	**Not Applicable (weighted)***
A. Weekend trips (n=17)	**0 to 365**	**14.1 days**	**7 days (37.5%)**	**n=0**
B. Trips of one week or longer (n=15)	**0 to 365**	**31.6 days**	**30 days (21.6%)**	**n=2**

**These respondents indicated they do not typically take trips of this length when traveling in Alberta*

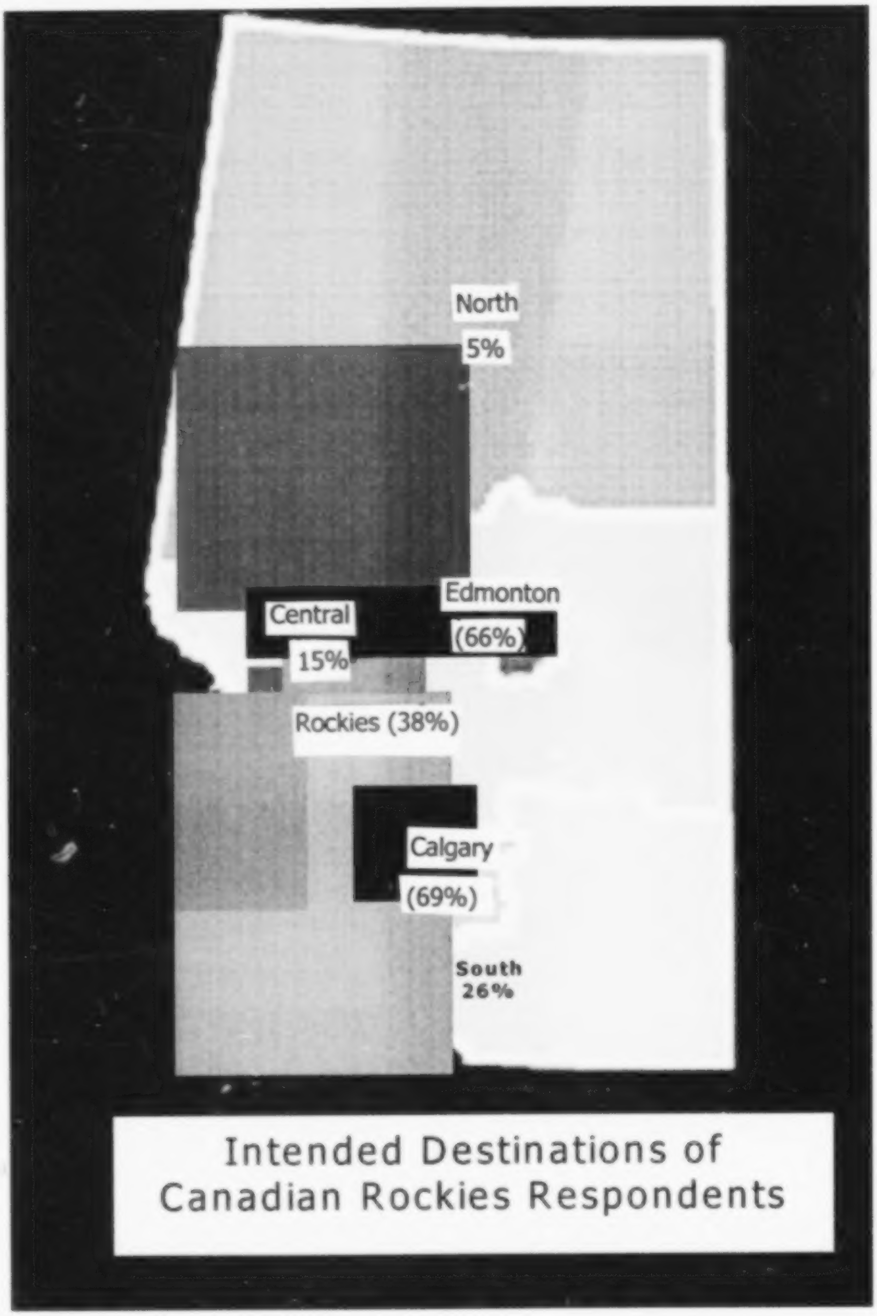
Specific Destinations

When Canadian Rockies respondents were asked about the destinations they plan to visit over the next six months within the province, the most named destination is Calgary & Area (69%) followed by Edmonton & Area (66%), as well as destinations within their own region (38%). Another quarter plan to travel to destinations within Alberta South (27%), 15% plan to take trips to Alberta Central and 5% will take trips to Alberta North.

(A Flow Map depicting planned travel from this Region is noted as Figure 89 on the following page)

Figure 89 – Flow Map of Canadian Rockies Respondents Intended Destinations*

**Please note that these results do not take into account the frequency of planned visits to each key destination*


North
5%
Central
15%
Edmonton
(66%)
Rockies (38%)
Calgary
(69%)
South
26%
Intended Destinations of
Canadian Rockies Respondents

Activities

Respondents were asked to indicate how likely they are to participate in a variety of activities while on leisure trips over the next six months. The most popular activity for Canadian Rockies respondents was *Visiting family and friends*, (48% - very likely to participate in this activity); this results in a mean of 3.3 out of 4.

One (1) of the remaining 16 activities was also indicated by the majority of respondents as being an activity they would be *very likely* to participate in over the next six month; namely, Outdoor Recreation (mean=3.0 out of 4).

Nine (9) of the activity types they are more likely to participate in than not, and reflect a mean ranging from 2.1 to 2.9. These include: Outdoor Summer Sports (2.9 out of 4), Indoor Leisure activities (2.8 out of 4), Outdoor Leisure (2.4 out of 4), Festivals & Cultural activities (2.4 out of 4), Outdoor Winter Sports (2.3 out of 4), Museums & Historical sites (2.3 out of 4) Attractions (2.2 out of 4), Outdoor Adventure (2.1 out of 4) and the Calgary Stampede & Klondike Days (2.1 out of 4).

Less popular activities, and those with the least likelihood for participation include Team Sports (1.9 out of 4), Spectator Sports & Entertainment (1.8 out of 4), Aboriginal Attractions (1.8 out of 4), Organized Sports Events (1.7 out of 4), and Spas & other Health Club (1.7 out of 4). (See Table 37 below)

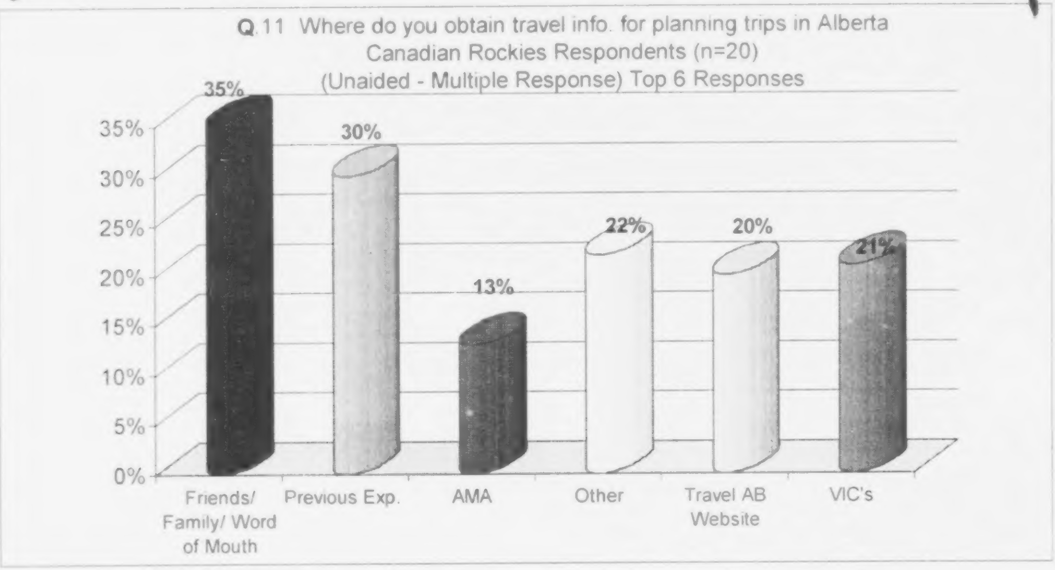
Table 37

Q.10 Activities Canadian Rockies Respondents (n=20)	Likelihood of Participating in...					Mean
	Very Unlikely	Somewhat Unlikely	Somewhat Likely	Very Likely	Don't Know	
Visit Friends & Relatives	5.9%	6.9%	39.2%	48.0%	1.0%	3.3
Outdoor Recreation	20.6%	5.9%	27.5%	46.1%	0	3.0
Outdoor Summer Sports	20.6%	5.9%	33.3%	40.2%	0	2.9
Indoor Leisure Activities	21.6%	9.8%	37.3%	30.4%	1.0%	2.8
Outdoor Leisure	34.3%	12.7%	38.8%	32.9%	0	2.4
Festivals & Cultural Activities	35.3%	10.8%	31.4%	21.6%	1.0%	2.4
Museums & Historical Sites	41.2%	9.8%	29.4%	18.6%	1.0%	2.3
Outdoor Winter Sports	44.1%	11.8%	13.7%	29.4%	1.0%	2.3
Attractions	37.3%	15.7%	34.3%	12.7%	0	2.2
Calgary Stampede/ Klondike Days	48.0%	12.7%	24.5%	14.7%	0	2.1
Outdoor Adventure	45.1%	11.8%	28.4%	13.7%	1.0%	2.1
Team Sports	55.9%	12.7%	18.6%	12.7%	0	1.9
Spectator Sports & Entertainment	53.9%	14.7%	19.6%	11.8%	0	1.9
Aboriginal Attractions	54.9%	20.6%	19.6%	4.9%	0	1.8
Organized Sports Events	55.9%	20.6%	14.7%	6.9%	2.0%	1.7
Spas & Other Health Club	65.7%	9.8%	16.7%	7.8%	0	1.7

Information Sources

When Canadian Rockies respondents were asked about the information sources they rely on when planning trips in Alberta, the most frequently mentioned source is *friends, family* or *word-of-mouth* (35%). Close to a third rely on their previous experiences (30%), and twenty percent (20%) rely on the Travel Alberta Website or Tourist Information Centres (21%). The AMA was mentioned by 13%, and 22% named a variety of other sources including; the Internet in general, and books. (Figure 90 below)

Figure 90



Accommodations

Few differences exist among these respondents when it comes to the typical choice of accommodations for either a weekend trip or trips of one week or longer.

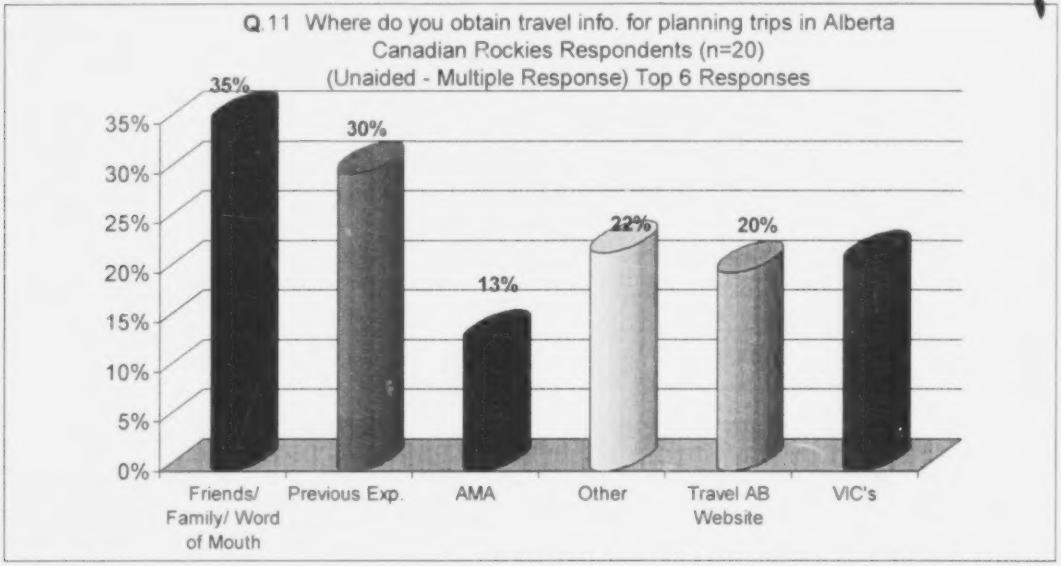
- Half (50%) choose to stay in hotels/motels on both weekend trips or trips of a week or longer
- Less than one-quarter (24%) would stay with friends or family for weekend trips and 20% would do the same for trips of one week and longer.
- Nine percent (9%) of respondents would use a Camper/5th wheel or Motorhome on trips of one week or longer. 11% will choose this type of accommodation for weekend trips
- 16% choose to tent or use a tent trailer on weekend trips, while 14% will use this type of accommodation on trips one week or longer

(See Figure 91 on the following page)

Information Sources

When Canadian Rockies respondents were asked about the information sources they rely on when planning trips in Alberta, the most frequently mentioned source is *friends, family* or *word-of-mouth* (35%). Close to a third rely on their previous experiences (30%), and twenty percent (20%) rely on the Travel Alberta Website or Tourist Information Centres (21%). The AMA was mentioned by 13%, and 22% named a variety of other sources including; the Internet in general, and books. (Figure 90 below)

Figure 90



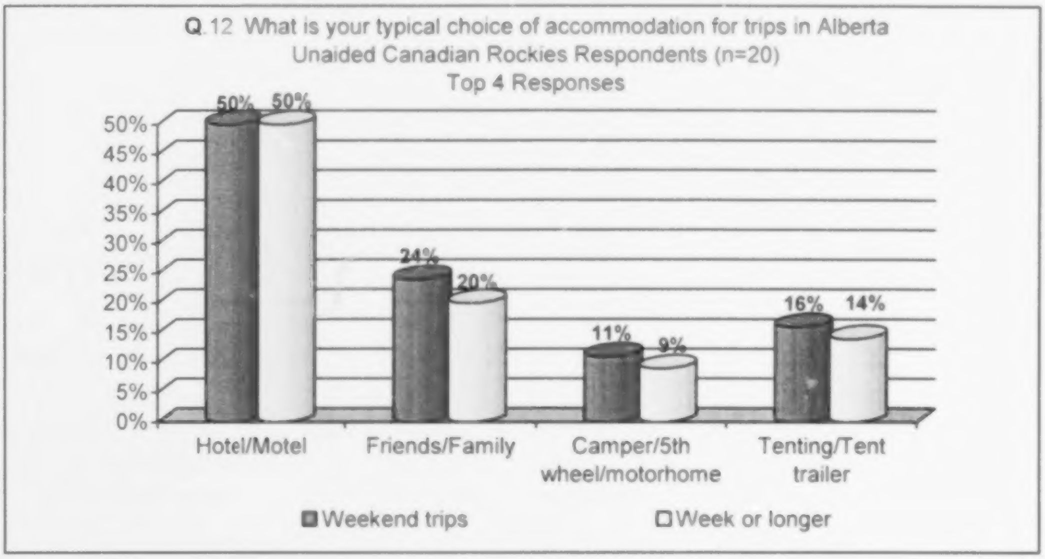
Accommodations

Few differences exist among these respondents when it comes to the typical choice of accommodations for either a weekend trip or trips of one week or longer.

- Half (50%) choose to stay in hotels/motels on both weekend trips or trips of a week or longer
- Less than one-quarter (24%) would stay with friends or family for weekend trips and 20% would do the same for trips of one week and longer.
- Nine percent (9%) of respondents would use a Camper/5th wheel or Motorhome on trips of one week or longer. 11% will choose this type of accommodation for weekend trips
- 16% choose to tent or use a tent trailer on weekend trips, while 14% will use this type of accommodation on trips one week or longer

(See Figure 91 on the following page)

Figure 91



Advertising Recall

Respondents were asked if they could recall seeing, hearing or reading any advertising about travel in the previous two to three months. More than a half (54%) indicated they could recall travel advertising. However, when asked about specific details of this advertising the response from this Region was as limited as other Regions.

The media source with the most recall was newspapers (31%) followed by TV (22%), and brochures (18%). 'Other sources' included other magazines (15%), travel guides (4%) and the radio (4%).

Destinations they recall from the advertising are coded into one of the six Tourism Destination Regions (TDR). The most frequently recall is for destinations located in the Canadian Rockies (29%), followed by Calgary & Area (4%), Edmonton & Area (4%) and Alberta Central (4%). Advertising for destinations within Alberta South had a low recall of 2% and there was no recall of advertising for Alberta North.

Only a few respondents were able to recall the content of this advertising. The most frequent recall was about advertising on activities in general (13%), camping (11%), sight-seeing (9%), skiing (4%), shopping (4%), trail riding (4%), hotels (4%).

Travel Alberta was identified the most often (15%) as the sponsor of this advertising, followed by the AMA (2%). No other sponsors were mentioned. (See Table 38 on the following page)

Table 38

Q.13B Please describe the advertising...(Unaided - Multiple Response)
Canadian Rockies Respondents (n=11)
Top 6 responses per category

Media Source		**Destinations**		**Activities**		**Sponsor**	
Newspaper	30.9%	Canadian Rockies	29.1%	Activities in general	12.7%	Travel Alberta	14.5%
TV	21.8%	Calgary & Area	3.6%	Camping	10.9%	AMA	1.8%
Brochures	18.2%	Edmonton & Area	3.6%	Sight-seeing	9.1%		
Other magazine(s)	14.5%	Alberta Central	3.6%	Skiing	7.3%		
Radio	3.6%	Alberta South	1.8%	Shopping	3.6%		
Travel guides	3.6%	Alberta North	0	Trail riding	3.6%		
Do not recall	**21.9%**	**Do not recall**	**60.0%**	**recall**	**52.7%**	**Do not recall**	

The *"Edmonton – Plan on Having Fun"* Campaign

Canadian Rockies respondents were not one of the target groups for the "Edmonton – Plan on having fun" campaign run from May 12, 2003 to May 18, 2003. Of the 11 Canadian Rockies respondents who recalled advertising in the previous two to three months, one named this particular campaign. This respondent recalled the campaign from TV, newspaper, brochures and glossy magazines, and indicated that the campaign had not impacted their travel plans for the next 6 months.

Global Events

Seventeen percent (17%) of Canadian Rockies respondents reported their travel plans for the next six months had been impacted by recent global events. The events with the most impact included the SARS outbreak (71%), followed by the war in Iraq (65%) and to a much lesser degree the 9/11 events or terrorism in general (35%). The West Nile Virus (6%) was mentioned by much fewer respondents.

When asked how these events had impacted their travel plans, almost half said they *"are staying close to home, in Alberta"* (47%), or, they were *"not flying – only driving"* (29%). Six percent (6%) of respondents indicated they are *"taking fewer trips"* overall (6%), and twelve percent said they are *"staying at home and not traveling anywhere"* (12%).

One respondent from this region indicated that global events in general have stopped them from traveling to the USA. (See Table 39 on the following page)

Table 39 – Canadian Rockies Respondents (n=3)

Q.15A Have any global events made an impact on your travel plans for the next 6 months?			
Yes	16.7%	No	83.3%
Q.15B Which events in particular had an impact? (Aided - Multiple Response) Canadian Rockies Respondents (n=3)		**Q.16 How has this/these event(s) impacted your travel plans for the next 6 months (Unaided - Multiple response) Canadian Rockies Respondents (n=3)**	
SARS	70.6%	Staying close to home – in AB	47.1%
War in Iraq	64.7%	Not flying – only driving	29.4%
9/11 Terrorism in general	35.3%	Taking fewer trips	5.9%
West Nile Virus	5.9%	Staying at home – not traveling	11.8%
		Other; • Not traveling to US	5.9% (1)

Demographics

Q.17 Family Composition		**Q.18 Age**	
Single parent with children	9.8%	18 to 24 years	11.8%
Single Adult Household	8.8%	25 to 34 years	30.4%
2 Adults with Children	32.4%	35 to 44 years	19.6%
2 Adults without Children	45.1%	45 to 54 years	17.6%
3 or more Single Adults without children	1.5%	55 to 64 years	6.9%
3 or more Single Adults with Children	0	65 or older	4.9%
Refused	0	Refused	8.8%
Q.19 Income			
Less than $25,000	4.9%	Yes	38.2%
$25,000 to $49,999		No	60.8%
$50,000 to $99,999	31.4%	Don't Know	1.0%
$100,000 and over	12.7%	Refused	0
Refused	16.7%		
Q.21 Gender			
Male	21.6%		
Female	78.4%		